BUS 310: BUSINESS COMMUNICATIONS (BUCH)

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Licensing

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1: Foundations of Business Communications

SECTION OVERVIEW

1.1: Effective Business Communication

Communication is key to your success—in relationships, in the workplace, as a citizen of your country, and across your lifetime. Your ability to communicate comes from experience, and experience can be an effective teacher, but this text and the related business communication course will offer you a wealth of experiences gathered from professional speakers across their lifetimes. You can learn from the lessons they've learned and be a more effective communicator right out of the gate.

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 book, we will examine this problem solving process and help you learn to apply it in the kinds of situations you are likely to encounter over the course of your career.

Thumbnail: pixabay.com/photos/accomplis...dults-3840827/

1.1.1: Why Is It Important to Communicate Well?

Learning Objectives

- Recognize the importance of communication in gaining a better understanding of yourself and others.
- Explain how communication skills help you solve problems, learn new things, and build your career.

Communication Influences Your Thinking about Yourself and Others

We all share a fundamental drive to communicate. Communication can be defined as the process of understanding and sharing meaning (Pearson & Nelson, 2000). You share meaning in what you say and how you say it, both in oral and written forms. If you could not communicate, what would life be like? A series of never-ending frustrations? Not being able to ask for what you need or even to understand the needs of others?

Being unable to communicate might even mean losing a part of yourself, for you communicate your self-concept—your sense of self and awareness of who you are—in many ways. Do you like to write? Do you find it easy to make a phone call to a stranger or to speak to a room full of people? Perhaps someone told you that you don't speak clearly or your grammar needs improvement. Does that make you more or less likely to want to communicate? For some, it may be a positive challenge, while for others it may be discouraging. But in all cases, your ability to communicate is central to your self-concept.

Take a look at your clothes. What are the brands you are wearing? What do you think they say about you? Do you feel that certain styles of shoes, jewelry, tattoos, music, or even automobiles express who you are? Part of your self-concept may be that you express yourself through texting, or through writing longer documents like essays and research papers, or through the way you speak.

On the other side of the coin, your communications skills help you to understand others—not just their words, but also their tone of voice, their nonverbal gestures, or the format of their written documents provide you with clues about who they are and what their values and priorities may be. Active listening and reading are also part of being a successful communicator.

Communication Influences How You Learn

When you were an infant, you learned to talk over a period of many months. When you got older, you didn't learn to ride a bike, drive a car, or even text a message on your cell phone in one brief moment. You need to begin the process of improving your speaking and writing with the frame of mind that it will require effort, persistence, and self-correction.

You learn to speak in public by first having conversations, then by answering questions and expressing your opinions in class, and finally by preparing and delivering a "stand-up" speech. Similarly, you learn to write by first learning to read, then by writing and learning to think critically. Your speaking and writing are reflections of your thoughts, experience, and education. Part of that combination is your level of experience listening to other speakers, reading documents and styles of writing, and studying formats similar to what you aim to produce.

As you study business communication, you may receive suggestions for improvement and clarification from speakers and writers more experienced than yourself. Take their suggestions as challenges to improve; don't give up when your first speech or first draft does not communicate the message you intend. Stick with it until you get it right. Your success in communicating is a skill that applies to almost every field of work, and it makes a difference in your relationships with others.

Remember, luck is simply a combination of preparation and timing. You want to be prepared to communicate well when given the opportunity. Each time you do a good job, your success will bring more success.

Communication Represents You and Your Employer

You want to make a good first impression on your friends and family, instructors, and employer. They all want you to convey a positive image, as it reflects on them. In your career, you will represent your business or company in spoken and written form. Your professionalism and attention to detail will reflect positively on you and set you up for success.

In both oral and written situations, you will benefit from having the ability to communicate clearly. These are skills you will use for the rest of your life. Positive improvements in these skills will have a positive impact on your relationships, your prospects for employment, and your ability to make a difference in the world.

Communication Skills Are Desired by Business and Industry

Oral and written communication proficiencies are consistently ranked in the top ten desirable skills by employer surveys year after year. In fact, high-powered business executives sometimes hire consultants to coach them in sharpening their communication skills. According to the National Association of Colleges and Employers, the following are the top five personal qualities or skills potential employers seek:

1. Communication skills (verbal and written)
2. Strong work ethic
3. Teamwork skills (works well with others, group communication)
4. Initiative
5. Analytical skills

Knowing this, you can see that one way for you to be successful and increase your promotion potential is to increase your abilities to speak and write effectively.

Figure 1.1.1.1: Effective communication skills are assets that will get you there. Maryland GovPics – Baltimore Jewish Council Meeting – CC BY 2.0.

In September 2004, the National Commission on Writing for America's Families, Schools, and Colleges published a study on 120 human resource directors titled *Writing: A Ticket to Work…Or a Ticket Out, A Survey of Business Leaders*. The study found that "writing is both a 'marker' of high-skill, high-wage, professional work and a 'gatekeeper' with clear equity implications," said Bob Kerrey, president of New School University in New York and chair of the commission. "People unable to express themselves clearly in writing limit their opportunities for professional, salaried employment." (The College Board, 2004)

On the other end of the spectrum, it is estimated that over forty million Americans are illiterate, or unable to functionally read or write. If you are reading this book, you may not be part of an at-risk group in need of basic skill development, but you still may need additional training and practice as you raise your skill level.

An individual with excellent communication skills is an asset to every organization. No matter what career you plan to pursue, learning to express yourself professionally in speech and in writing will help you get there.

Key Takeaway

Communication forms a part of your self-concept, and it helps you understand yourself and others, solve problems and learn new things, and build your career.

Exercises

1. Imagine that you have been hired to make "cold calls" to ask people whether they are familiar with a new restaurant that has just opened in your neighborhood. Write a script for the phone call. Ask a classmate to copresent as you deliver the script orally in class, as if you were making a phone call to the classmate. Discuss your experience with the rest of the class.
2. Imagine you have been assigned the task of creating a job description. Identify a job, locate at least two sample job descriptions, and create one. Please present the job description to the class and note to what degree communication skills play a role in the tasks or duties you have included.

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1.1.2: What Is Communication?

Learning Objectives

- Define communication and describe communication as a process.
- Identify and describe the eight essential components of communication.
- Identify and describe two models of communication.

Many theories have been proposed to describe, predict, and understand the behaviors and phenomena of which communication consists. When it comes to communicating in business, we are often less interested in theory than in making sure our communications generate the desired results. But in order to achieve results, it can be valuable to understand what communication is and how it works.

Defining Communication

The root of the word "communication" in Latin is *communicare*, which means to share, or to make common (Weekley, 1967). Communication is defined as the process of understanding and sharing meaning (Pearson & Nelson, 2000).

At the center of our study of communication is the relationship that involves interaction between participants. This definition serves us well with its emphasis on the process, which we'll examine in depth across this text, of coming to understand and share another's point of view effectively.

The first key word in this definition is process. A process is a dynamic activity that is hard to describe because it changes (Pearson & Nelson, 2000). Imagine you are alone in your kitchen thinking. Someone you know (say, your mother) enters the kitchen and you talk briefly. What has changed? Now, imagine that your mother is joined by someone else, someone you haven't met before—and this stranger listens intently as you speak, almost as if you were giving a speech. What has changed? Your perspective might change, and you might watch your words more closely. The feedback or response from your mother and the stranger (who are, in essence, your audience) may cause you to reevaluate what you are saying. When we interact, all these factors—and many more—influence the process of communication.

The second key word is understanding: "To understand is to perceive, to interpret, and to relate our perception and interpretation to what we already know." (McLean, 2003) If a friend tells you a story about falling off a bike, what image comes to mind? Now your friend points out the window and you see a motorcycle lying on the ground. Understanding the words and the concepts or objects they refer to is an important part of the communication process.

Next comes the word sharing. Sharing means doing something together with one or more people. You may share a joint activity, as when you share in compiling a report; or you may benefit jointly from a resource, as when you and several coworkers share a pizza. In communication, sharing occurs when you convey thoughts, feelings, ideas, or insights to others. You can also share with yourself (a process called intrapersonal communication) when you bring ideas to consciousness, ponder how you feel about something, or figure out the solution to a problem and have a classic "Aha!" moment when something becomes clear.

Finally, meaning is what we share through communication. The word "bike" represents both a bicycle and a short name for a motorcycle. By looking at the context the word is used in and by asking questions, we can discover the shared meaning of the word and understand the message.

Eight Essential Components of Communication

In order to better understand the communication process, we can break it down into a series of eight essential components:

1. Source
2. Message
3. Channel
4. Receiver
5. Feedback
6. Environment
7. Context
8. Interference

Each of these eight components serves an integral function in the overall process. Let's explore them one by one.

Source

The source imagines, creates, and sends the message. In a public speaking situation, the source is the person giving the speech. He or she conveys the message by sharing new information with the audience. The speaker also conveys a message through his or her tone of voice, body language, and choice of clothing. The speaker begins by first determining the message—what to say and how to say it. The second step involves encoding the message by choosing just the right order or the perfect words to convey the intended meaning. The third step is to present or send the information to the receiver or audience. Finally, by watching for the audience's reaction, the source perceives how well they received the message and responds with clarification or supporting information.

Message

"The message is the stimulus or meaning produced by the source for the receiver or audience." (McLean, 2005) When you plan to give a speech or write a report, your message may seem to be only the words you choose that will convey your meaning. But that is just the beginning. The words are brought together with grammar and organization. You may choose to save your most important point for last. The message also consists of the way you say it—in a speech, with your tone of voice, your body language, and your appearance—and in a report, with your writing style, punctuation, and the headings and formatting you choose. In addition, part of the message may be the environment or context you present it in and the noise that might make your message hard to hear or see.

Imagine, for example, that you are addressing a large audience of sales reps and are aware there is a World Series game tonight. Your audience might have a hard time settling down, but you may choose to open with, "I understand there is an important game tonight." In this way, by expressing verbally something that most people in your audience are aware of and interested in, you might grasp and focus their attention.

Channel

"The channel is the way in which a message or messages travel between source and receiver." (McLean, 2005) For example, think of your television. How many channels do you have on your television? Each channel takes up some space, even in a digital world, in the cable or in the signal that brings the message of each channel to your home. Television combines an audio signal you hear with a visual signal you see. Together they convey the message to the receiver or audience. Turn off the volume on your television. Can you still understand what is happening? Many times you can, because the body language conveys part of the message of the show. Now turn up the volume but turn around so that you cannot see the television. You can still hear the dialogue and follow the story line.

Similarly, when you speak or write, you are using a channel to convey your message. Spoken channels include face-to-face conversations, speeches, telephone conversations and voice mail messages, radio, public address systems, and voice over Internet protocol (VoIP). Written channels include letters, memorandums, purchase orders, invoices, newspaper and magazine articles, blogs, e-mail, text messages, tweets, and so forth.

Receiver

"The receiver receives the message from the source, analyzing and interpreting the message in ways both intended and unintended by the source." (McLean, 2005) To better understand this component, think of a receiver on a football team. The quarterback throws the football (message) to a receiver, who must see and interpret where to catch the ball. The quarterback may intend for the receiver to "catch" his message in one way, but the receiver may see things differently and miss the football (the intended meaning) altogether.

As a receiver you listen, see, touch, smell, and/or taste to receive a message. Your audience "sizes you up," much as you might check them out long before you take the stage or open your mouth. The nonverbal responses of your listeners can serve as clues on how to adjust your opening. By imagining yourself in their place, you anticipate what you would look for if you were them. Just as a quarterback plans where the receiver will be in order to place the ball correctly, you too can recognize the interaction between source and receiver in a business communication context. All of this happens at the same time, illustrating why and how communication is always changing.

Feedback

When you respond to the source, intentionally or unintentionally, you are giving feedback. Feedback is composed of messages the receiver sends back to the source. Verbal or nonverbal, all these feedback signals allow the source to see how well, how accurately (or how poorly and inaccurately) the message was received. Feedback also provides an opportunity for the receiver or audience to ask for clarification, to agree or disagree, or to indicate that the source could make the message more interesting. As the amount of feedback increases, the accuracy of communication also increases (Leavitt & Mueller, 1951).

For example, suppose you are a sales manager participating in a conference call with four sales reps. As the source, you want to tell the reps to take advantage of the fact that it is World Series season to close sales on baseball-related sports gear. You state your message, but you hear no replies from your listeners. You might assume that this means they understood and agreed with you, but later in the month you might be disappointed to find that very few sales were made. If you followed up your message with a request for feedback ("Does this make sense? Do any of you have any questions?") you might have an opportunity to clarify your message, and to find out whether any of the sales reps believed your suggestion would not work with their customers.

Environment

"The environment is the atmosphere, physical and psychological, where you send and receive messages." (McLean, 2005) The environment can include the tables, chairs, lighting, and sound equipment that are in the room. The room itself is an example of the environment. The environment can also include factors like formal dress, that may indicate whether a discussion is open and caring or more professional and formal. People may be more likely to have an intimate conversation when they are physically close to each other, and less likely when they can only see each other from across the room. In that case, they may text each other, itself an intimate form of communication. The choice to text is influenced by the environment. As a speaker, your environment will impact and play a role in your speech. It's always a good idea to go check out where you'll be speaking before the day of the actual presentation.

Context

"The context of the communication interaction involves the setting, scene, and expectations of the individuals involved." (McLean, 2005) A professional communication context may involve business suits (environmental cues) that directly or indirectly influence expectations of language and behavior among the participants.

A presentation or discussion does not take place as an isolated event. When you came to class, you came from somewhere. So did the person seated next to you, as did the instructor. The degree to which the environment is formal or informal depends on the contextual expectations for communication held by the participants. The person sitting next to you may be used to informal communication with instructors, but this particular instructor may be used to verbal and nonverbal displays of respect in the academic environment. You may be used to formal interactions with instructors as well, and find your classmate's question of "Hey Teacher, do we have homework today?" as rude and inconsiderate when they see it as normal. The nonverbal response from the instructor will certainly give you a clue about how they perceive the interaction, both the word choices and how they were said.

Context is all about what people expect from each other, and we often create those expectations out of environmental cues. Traditional gatherings like weddings or quinceañeras are often formal events. There is a time for quiet social greetings, a time for silence as the bride walks down the aisle, or the father may have the first dance with his daughter as she is transformed from a girl to womanhood in the eyes of her community. In either celebration there may come a time for rambunctious celebration and dancing. You may be called upon to give a toast, and the wedding or quinceañera context will influence your presentation, timing, and effectiveness.

Figure 1.1.2.1: Context is all about what people expect from each other. Toshihiro Gamo – Marriage Matrix – CC BY-NC-ND 2.0.

In a business meeting, who speaks first? That probably has some relation to the position and role each person has outside the meeting. Context plays a very important role in communication, particularly across cultures.

Interference

Interference, also called noise, can come from any source. “Interference is anything that blocks or changes the source’s intended meaning of the message.”(McLean, 2005) For example, if you drove a car to work or school, chances are you were surrounded by noise. Car horns, billboards, or perhaps the radio in your car interrupted your thoughts, or your conversation with a passenger.

Psychological noise is what happens when your thoughts occupy your attention while you are hearing, or reading, a message. Imagine that it is 4:45 p.m. and your boss, who is at a meeting in another city, e-mails you asking for last month’s sales figures, an analysis of current sales projections, and the sales figures from the same month for the past five years. You may open the e-mail, start to read, and think, “Great—no problem—I have those figures and that analysis right here in my computer.” You fire off a reply with last month’s sales figures and the current projections attached. Then, at five o’clock, you turn off your computer and go home. The next morning, your boss calls on the phone to tell you he was inconvenienced because you neglected to include the sales figures from the previous years. What was the problem? Interference: by thinking about how you wanted to respond to your boss’s message, you prevented yourself from reading attentively enough to understand the whole message.

Interference can come from other sources, too. Perhaps you are hungry, and your attention to your current situation interferes with your ability to listen. Maybe the office is hot and stuffy. If you were a member of an audience listening to an executive speech, how could this impact your ability to listen and participate?

Noise interferes with normal encoding and decoding of the message carried by the channel between source and receiver. Not all noise is bad, but noise interferes with the communication process. For example, your cell phone ringtone may be a welcome noise to you, but it may interrupt the communication process in class and bother your classmates.

Two Models of Communication

Researchers have observed that when communication takes place, the source and the receiver may send messages at the same time, often overlapping. You, as the speaker, will often play both roles, as source and receiver. You’ll focus on the communication and the reception of your messages to the audience. The audience will respond in the form of feedback that will give you important clues. While there are many models of communication, here we will focus on two that offer perspectives and lessons for business communicators.

Rather than looking at the source sending a message and someone receiving it as two distinct acts, researchers often view communication as a transactional process (Figure 1.1.2.2), with actions often happening at the same time. The distinction between source and receiver is blurred in conversational turn-taking, for example, where both participants play both roles simultaneously.

Figure 1.1.2.2: Transactional Model of Communication

Researchers have also examined the idea that we all construct our own interpretations of the message. As the State Department quote at the beginning of this chapter indicates, what I said and what you heard may be different. In the constructivist model (Figure 1.1.2.3), we focus on the negotiated meaning, or common ground, when trying to describe communication (Pearce & Cronen, 1980),

Imagine that you are visiting Atlanta, Georgia, and go to a restaurant for dinner. When asked if you want a "Coke," you may reply, "sure." The waiter may then ask you again, "what kind?" and you may reply, "Coke is fine." The waiter then may ask a third time, "what kind of soft drink would you like?" The misunderstanding in this example is that in Atlanta, the home of the Coca-Cola Company, most soft drinks are generically referred to as "Coke." When you order a soft drink, you need to specify what type, even if you wish to order a beverage that is not a cola or not even made by the Coca-Cola Company. To someone from other regions of the United States, the words "pop," "soda pop," or "soda" may be the familiar way to refer to a soft drink; not necessarily the brand "Coke." In this example, both you and the waiter understand the word "Coke," but you each understand it to mean something different. In order to communicate, you must each realize what the term means to the other person, and establish common ground, in order to fully understand the request and provide an answer.

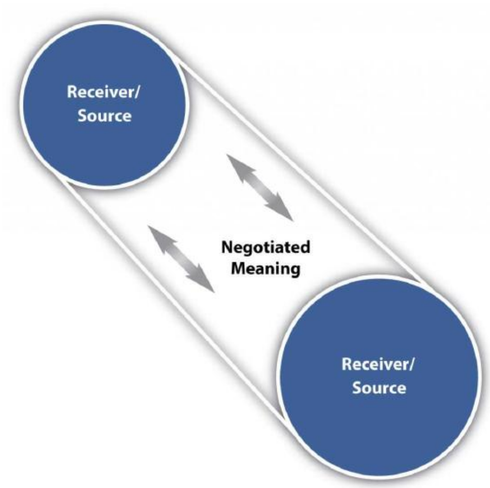

Figure 1.1.2.3: Constructivist Model of Communication

Because we carry the multiple meanings of words, gestures, and ideas within us, we can use a dictionary to guide us, but we will still need to negotiate meaning.

Key Takeaway

The communication process involves understanding, sharing, and meaning, and it consists of eight essential elements: source, message, channel, receiver, feedback, environment, context, and interference. Among the models of communication are the transactional process, in which actions happen simultaneously, and the constructivist model, which focuses on shared meaning.

Exercises

1. Draw what you think communication looks like. Share your drawing with your classmates.
2. List three environmental cues and indicate how they influence your expectations for communication. Please share your results with your classmates.
3. How does context influence your communication? Consider the language and culture people grew up with, and the role these play in communication styles.
4. If you could design the perfect date, what activities, places, and/or environmental cues would you include to set the mood? Please share your results with your classmates.

5. Observe two people talking. Describe their communication. See if you can find all eight components and provide an example for each one.
6. What assumptions are present in transactional model of communication? Find an example of a model of communication in your workplace or classroom, and provide an example for all eight components.

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1.1.3: Communication in Context

Learning Objectives

- Identify and describe five types of communication contexts.

Now that we have examined the eight components of communication, let's examine this in context. Is a quiet dinner conversation with someone you care about the same experience as a discussion in class or giving a speech? Is sending a text message to a friend the same experience as writing a professional project proposal or a purchase order? Each context has an influence on the communication process. Contexts can overlap, creating an even more dynamic process. You have been communicating in many of these contexts across your lifetime, and you'll be able to apply what you've learned through experience in each context to business communication.

Intrapersonal Communication

Have you ever listened to a speech or lecture and gotten caught up in your thoughts so that, while the speaker continued, you were no longer listening? During a phone conversation, have you ever been thinking about what you are going to say, or what question you might ask, instead of listening to the other person? Finally, have you ever told yourself how you did after you wrote a document or gave a presentation? As you "talk with yourself" you are engaged in intrapersonal communication.

Intrapersonal communication involves one person; it is often called "self-talk." (Wood, 1997) Donna Vocate's book on intrapersonal communication explains how, as we use language to reflect on our own experiences, we talk ourselves through situations. For example, the voice within you that tells you, "Keep on Going! I can DO IT!" when you are putting your all into completing a five-mile race; or that says, "This report I've written is pretty good." Your intrapersonal communication can be positive or negative, and directly influences how you perceive and react to situations and communication with others.

What you perceive in communication with others is also influenced by your culture, native language, and your world view. As the German philosopher Jürgen Habermas said, "Every process of reaching understanding takes place against the background of a culturally ingrained preunderstanding." (Habermas, 1984)

For example, you may have certain expectations of time and punctuality. You weren't born with them, so where did you learn them? From those around you as you grew up. What was normal for them became normal for you, but not everyone's idea of normal is the same.

When your supervisor invites you to a meeting and says it will start at 7 p.m., does that mean 7:00 sharp, 7-ish, or even 7:30? In the business context, when a meeting is supposed to start at 9 a.m., is it promptly a 9 a.m.? Variations in time expectations depend on regional and national culture as well as individual corporate cultures. In some companies, everyone may be expected to arrive ten to fifteen minutes before the announced start time to take their seats and be ready to commence business at 9:00 sharp. In other companies, "meeting and greeting" from about 9 to 9:05 or even 9:10 is the norm. When you are unfamiliar with the expectations for a business event, it is always wise to err on the side of being punctual, regardless of what your internal assumptions about time and punctuality may be.

Interpersonal Communication

The second major context within the field of communication is interpersonal communication. Interpersonal communication normally involves two people, and can range from intimate and very personal to formal and impersonal. You may carry on a conversation with a loved one, sharing a serious concern. Later, at work, you may have a brief conversation about plans for the weekend with the security guard on your way home. What's the difference? Both scenarios involve interpersonal communication, but are different in levels of intimacy. The first example implies a trusting relationship established over time between two caring individuals. The second example level implies some previous familiarity, and is really more about acknowledging each other than any actual exchange of information, much like saying hello or goodbye.

Group Communication

Have you ever noticed how a small group of people in class sit near each other? Perhaps they are members of the same sports program, or just friends, but no doubt they often engage in group communication.

“Group communication is a dynamic process where a small number of people engage in a conversation.” (McLean, 2005) Group communication is generally defined as involving three to eight people. The larger the group, the more likely it is to break down into smaller groups.

To take a page from marketing, does your audience have segments or any points of convergence/divergence? We could consider factors like age, education, sex, and location to learn more about groups and their general preferences as well as dislikes. You may find several groups within the larger audience, such as specific areas of education, and use this knowledge to increase your effectiveness as a business communicator.

Public Communication

In public communication, one person speaks to a group of people; the same is true of public written communication, where one person writes a message to be read by a small or large group. The speaker or writer may ask questions, and engage the audience in a discussion (in writing, examples are an e-mail discussion or a point-counter-point series of letters to the editor), but the dynamics of the conversation are distinct from group communication, where different rules apply. In a public speaking situation, the group normally defers to the speaker. For example, the boss speaks to everyone, and the sales team quietly listens without interruption.

This generalization is changing as norms and expectations change, and many cultures have a tradition of “call outs” or interjections that are not to be interpreted as interruptions or competition for the floor, but instead as affirmations. The boss may say, as part of a charged-up motivational speech, “Do you hear me?” and the sales team is expected to call back “Yes Sir!” The boss, as a public speaker, recognizes that intrapersonal communication (thoughts of the individual members) or interpersonal communication (communication between team members) may interfere with this classic public speaking dynamic of all to one, or the audience devoting all its attention to the speaker, and incorporate attention getting and engagement strategies to keep the sales team focused on the message.

Mass Communication

How do you tell everyone on campus where and when all the classes are held? Would a speech from the front steps work? Perhaps it might meet the need if your school is a very small one. A written schedule that lists all classes would be a better alternative. How do you let everyone know there is a sale on in your store, or that your new product will meet their needs, or that your position on a political issue is the same as your constituents? You send a message to as many people as you can through mass communication. Does everyone receive mass communication the same way the might receive a personal phone call? Not likely. Some people who receive mass mailings assume that they are “junk mail” (i.e., that they do not meet the recipients’ needs) and throw them away unopened. People may tune out a television advertisement with a click of the mute button, delete tweets or ignore friend requests on Facebook by the hundreds, or send all unsolicited e-mail straight to the spam folder unread.

Mass media is a powerful force in modern society and our daily lives, and is adapting rapidly to new technologies. Mass communication involves sending a single message to a group. It allows us to communicate our message to a large number of people, but we are limited in our ability to tailor our message to specific audiences, groups, or individuals. As a business communicator, you can use multimedia as a visual aid or reference common programs, films, or other images that your audience finds familiar yet engaging. You can tweet a picture that is worth far more than 140 characters, and you are just as likely to elicit a significant response. By choosing messages or references that many audience members will recognize or can identify with, you can develop common ground and increase the appeal of your message.

Key Takeaway

Communication contexts include intrapersonal, interpersonal, group, public, and mass communication. Each context has its advantages and disadvantages, and its appropriate and inappropriate uses.

Exercises

1. Please recall a time when you gave a speech in front of a group. How did you feel? What was your experience? What did you learn from your experience?
2. If you were asked to get the attention of your peers, what image or word would you choose and why?
3. If you were asked to get the attention of someone like yourself, what image or word would you choose and why?
4. Make a list of mass communication messages you observe for a one hour period of time. Share your list with classmates.

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1.1.4: Your Responsibilities as a Communicator

Learning Objectives

1. Discuss and provide several examples of each of the two main responsibilities of a business communicator.

Whenever you speak or write in a business environment, you have certain responsibilities to your audience, your employer, and your profession. Your audience comes to you with an inherent set of expectations that you will fulfill these responsibilities. The specific expectations may change given the context or environment, but two central ideas will remain: be prepared, and be ethical.

Communicator is Prepared

As the business communicator's first responsibility, preparation includes several facets which we will examine: organization, clarity, and being concise and punctual.

Being prepared means that you have selected a topic appropriate to your audience, gathered enough information to cover the topic well, put your information into a logical sequence, and considered how best to present it. If your communication is a written one, you have written an outline and at least one rough draft, read it over to improve your writing and correct errors, and sought feedback where appropriate. If your communication is oral, you have practiced several times before your actual performance.

The Prepared Communicator is Organized

Part of being prepared is being organized. Aristotle called this *logos*, or logic, and it involves the steps or points that lead your communication to a conclusion. Once you've invested time in researching your topic, you will want to narrow your focus to a few key points and consider how you'll present them. On any given topic there is a wealth of information; your job is to narrow that content down to a manageable level, serving the role of gatekeeper by selecting some information and "de-selecting," or choosing to not include other points or ideas.

You also need to consider how to link your main points together for your audience. Use transitions to provide signposts or cues for your audience to follow along. "Now that we've examined X, let's consider Y" is a transitional statement that provides a cue that you are moving from topic to topic. Your listeners or readers will appreciate your being well organized so that they can follow your message from point to point.

The Prepared Communicator is Clear

You have probably had the unhappy experience of reading or listening to a communication that was vague and wandering. Part of being prepared is being clear. If your message is unclear, the audience will lose interest and tune you out, bringing an end to effective communication.

Interestingly, clarity begins with intrapersonal communication: you need to have a clear idea in your mind of what you want to say before you can say it clearly to someone else. At the interpersonal level, clarity involves considering your audience, as you will want to choose words and phrases they understand and avoid jargon or slang that may be unfamiliar to them.

Clarity also involves presentation. A brilliant message scrawled in illegible handwriting, or in pale gray type on gray paper, will not be clear. When it comes to oral communication, if you mumble your words, speak too quickly or use a monotonous tone of voice, or stumble over certain words or phrases, the clarity of your presentation will suffer.

Technology also plays a part; if you are using a microphone or conducting a teleconference, clarity will depend on this equipment functioning properly—which brings us back to the importance of preparation. In this case, in addition to preparing your speech, you need to prepare by testing the equipment ahead of time.

The Prepared Communicator is Concise and Punctual

Concise means brief and to the point. In most business communications you are expected to "get down to business" right away. Being prepared includes being able to state your points clearly and support them with clear evidence in a relatively straightforward, linear way.

It may be tempting to show how much you know by incorporating additional information into your document or speech, but in so doing you run the risk of boring, confusing, or overloading your audience. Talking in circles or indulging in tangents, where you get off topic or go too deep, can hinder an audience's ability to grasp your message. Be to the point and concise in your choice of words, organization, and even visual aids.

Being concise also involves being sensitive to time constraints. How many times have you listened to a speaker say "in conclusion" only to continue speaking for what seems like forever? How many meetings and conference calls have you attended that got started late or ran beyond the planned ending time? The solution, of course, is to be prepared to be punctual. If you are asked to give a five-minute presentation at a meeting, your coworkers will not appreciate your taking fifteen minutes, any more than your supervisor would appreciate your submitting a fifteen-page report when you were asked to write five pages. For oral presentations, time yourself when you rehearse and make sure you can deliver your message within the allotted number of minutes.

Figure 1.1.4.1: Good business communication does not waste words or time. Angelina Earley – Times! Of! The World! – CC BY-NC-ND 2.0

There is one possible exception to this principle. Many non-Western cultures prefer a less direct approach, where business communication often begins with social or general comments that a U.S. audience might consider unnecessary. Some cultures also have a less strict interpretation of time schedules and punctuality. While it is important to recognize that different cultures have different expectations, the general rule holds true that good business communication does not waste words or time.

Communicator is Ethical

The business communicator's second fundamental responsibility is to be ethical. Ethics refers to a set of principles or rules for correct conduct. It echoes what Aristotle called *ethos*, the communicator's good character and reputation for doing what is right. Communicating ethically involves being egalitarian, respectful, and trustworthy—overall, practicing the "golden rule" of treating your audience the way you would want to be treated.

Communication can move communities, influence cultures, and change history. It can motivate people to take stand, consider an argument, or purchase a product. The degree to which you consider both the common good and fundamental principles you hold to be true when crafting your message directly relates to how your message will affect others.

The Ethical Communicator is Egalitarian

The word "egalitarian" comes from the root "equal." To be egalitarian is to believe in basic equality: that all people should share equally in the benefits and burdens of a society. It means that everyone is entitled to the same respect, expectations, access to information, and rewards of participation in a group.

To communicate in an egalitarian manner, speak and write in a way that is comprehensible and relevant to all your listeners or readers, not just those who are "like you" in terms of age, gender, race or ethnicity, or other characteristics.

In business, you will often communicate to people with certain professional qualifications. For example, you may draft a memo addressed to all the nurses in a certain hospital, or give a speech to all the adjusters in a certain branch of an insurance company. Being egalitarian does not mean you have to avoid professional terminology that is understood by nurses or insurance adjusters. But it does mean that your hospital letter should be worded for all the hospital's nurses—not just female nurses, not just nurses working directly with patients, not just nurses under age fifty-five. An egalitarian communicator seeks to unify the audience by using ideas and language that are appropriate for all the message's readers or listeners.

The Ethical Communicator is Respectful

People are influenced by emotions as well as logic. Aristotle named *pathos*, or passion, enthusiasm and energy, as the third of his three important parts of communicating after *logos* and *ethos*.

Most of us have probably seen an audience manipulated by a “cult of personality,” believing whatever the speaker said simply because of how dramatically he or she delivered a speech; by being manipulative, the speaker fails to respect the audience. We may have also seen people hurt by sarcasm, insults, and other disrespectful forms of communication.

This does not mean that passion and enthusiasm are out of place in business communication. Indeed, they are very important. You can hardly expect your audience to care about your message if you don’t show that you care about it yourself. If your topic is worth writing or speaking about, make an effort to show your audience why it is worthwhile by speaking enthusiastically or using a dynamic writing style. Doing so, in fact, shows respect for their time and their intelligence.

However, the ethical communicator will be passionate and enthusiastic without being disrespectful. Losing one’s temper and being abusive are generally regarded as showing a lack of professionalism (and could even involve legal consequences for you or your employer). When you disagree strongly with a coworker, feel deeply annoyed with a difficult customer, or find serious fault with a competitor’s product, it is important to express such sentiments respectfully. For example, instead of telling a customer, “I’ve had it with your complaints!” a respectful business communicator might say, “I’m having trouble seeing how I can fix this situation. Would you explain to me what you want to see happen?”

The Ethical Communicator is Trustworthy

Trust is a key component in communication, and this is especially true in business. As a consumer, would you choose to buy merchandise from a company you did not trust? If you were an employer, would you hire someone you did not trust?

Your goal as a communicator is to build a healthy relationship with your audience, and to do that you must show them why they can trust you and why the information you are about to give them is believable. One way to do this is to begin your message by providing some information about your qualifications and background, your interest in the topic, or your reasons for communicating at this particular time.

Your audience will expect that what you say is the truth as you understand it. This means that you have not intentionally omitted, deleted, or taken information out of context simply to prove your points. They will listen to what you say and how you say it, but also to what you don’t say or do. You may consider more than one perspective on your topic, and then select the perspective you perceive to be correct, giving concrete reasons why you came to this conclusion. People in the audience may have considered or believe in some of the perspectives you consider, and your attention to them will indicate you have done your homework.

Being worthy of trust is something you earn with an audience. Many wise people have observed that trust is hard to build but easy to lose. A communicator may not know something and still be trustworthy, but it’s a violation of trust to pretend you know something when you don’t. Communicate what you know, and if you don’t know something, research it before you speak or write. If you are asked a question to which you don’t know the answer, say “I don’t know the answer but I will research it and get back to you” (and then make sure you follow through later). This will go over much better with the audience than trying to cover by stumbling through an answer or portraying yourself as knowledgeable on an issue that you are not.

The “Golden Rule”

When in doubt, remember the “golden rule,” which says to treat others the way you would like to be treated. In all its many forms, the golden rule incorporates human kindness, cooperation, and reciprocity across cultures, languages, backgrounds and interests. Regardless of where you travel, who you communicate with, or what your audience is like, remember how you would feel if you were on the receiving end of your communication, and act accordingly.

Key Takeaway

As a communicator, you are responsible for being prepared and being ethical. Being prepared includes being organized, clear, concise, and punctual. Being ethical includes being egalitarian, respectful, and trustworthy and overall, practicing the “golden rule.”

Exercises

1. Recall one time you felt offended or insulted in a conversation. What contributed to your perception? Please share your comments with classmates.
2. When someone lost your trust, were they able earn it back? Please share your comments with classmates?
3. Does the communicator have a responsibility to the audience? Does the audience have a responsibility to the speaker? Why or why not? Please share your comments with classmates.

1.1.5: Additional Resources

The International Association of Business Communicators (IABC) is a global network of communication professionals committed to improving organizational effectiveness through strategic communication. http://www.iabc.com

Explore the Web site of the National Communication Association, the largest U.S. organization dedicated to communication. http://www.natcom.org

Read The National Commission on Writing's findings about the importance of communication skills in business. www.writingcommission.org/pr/writing_for_employ.html

The National Association of Colleges and Employers offers news about employment prospects for college graduates. http://www.naceweb.org

Dale Carnegie, author of the classic *How to Win Friends and Influence People*, may have been one of the greatest communicators of the twentieth-century business world. The Dale Carnegie Institute focuses on giving people in business the opportunity to sharpen their skills and improve their performance in order to build positive, steady, and profitable results. http://www.dalecarnegie.com

Purdue University's Online Writing Lab (OWL) provides a wealth of resources for writing projects. http://owl.english.purdue.edu

To communicate ethically, check your facts. FactCheck is a nonpartisan project of the Annenberg Center for Public Policy at the University of Pennsylvania. http://www.factcheck.org

To communicate ethically, check your facts. PolitiFact is a nonpartisan project of the St. Petersburg Times; it won a Pulitzer Prize in 2009. http://www.politifact.com

SECTION OVERVIEW

1.2: Intercultural and International Business Communication

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1.2.1: Intercultural Communication

> **Learning Objectives**
>
> 1. Define and discuss how to facilitate intercultural communication.
> 2. Define and discuss the effects of ethnocentrism.

Communication is the sharing of understanding and meaning (Pearson, J. and Nelson, P., 2000), but what is intercultural communication? If you answered, “The sharing of understanding and meaning across cultures,” you’d be close, but the definition requires more attention. What is a culture? Where does one culture stop and another start? How are cultures created, maintained, and dissolved? Donald Klopf described culture as “that part of the environment made by humans” (Klopf, D., 1991). From the building we erect that represents design values to the fences we install that delineate borders, our environment is a representation of culture, but it is not all that is culture.

Culture involves beliefs, attitudes, values, and traditions that are shared by a group of people. Thus, we must consider more than the clothes we wear, the movies we watch, or the video games we play, all representations of environment, as culture. Culture also involves the psychological aspects of our expectations of the communication context. For example, if we are raised in a culture where males speak while females are expected to remain silent, the context of the communication interaction governs behavior, which in itself is a representation of culture. From the choice of words (message), to how we communicate (in person, or by e-mail), to how we acknowledge understanding with a nod or a glance (nonverbal feedback), to the internal and external interference, all aspects of communication are influenced by culture.

In defining intercultural communication, we only have eight components of communication to work with and yet we must bridge divergent cultures with distinct values across languages and time zones to exchange value, a representation of meaning. It may be tempting to consider only the source and receiver within a transaction as a representation of intercultural communication, but if we do that, we miss the other six components—the message, channel, feedback, context, environment, and interference—in every communicative act. Each component influences and is influenced by culture. Is culture context? Environment? Message? Culture is represented in all eight components every time we communicate. All communication is intercultural.

We may be tempted to think of intercultural communication as interaction between two people from different countries. While two distinct national passports may be artifacts, or nonverbal representations of communication, what happens when two people from two different parts of the same country communicate? From high and low Germanic dialects, to the perspective of a Southerner versus a Northerner in the United States, to the rural versus urban dynamic, our geographic, linguistic, educational, sociological, and psychological traits influence our communication.

It is not enough to say that someone from rural Southern Chile and the capital, Santiago, both speak *Castellano* (the Chilean word for the Spanish language), so that communication between them must be intracultural communication, or communication within the same culture. What is life like for the rural Southerner? For the city dweller? Were their educational experiences the same? Do they share the same vocabulary? Do they value the same things? To a city dweller, all the sheep look the same. To the rural Southerner, the sheep are distinct, with unique markings; they have value as a food source, a source of wool with which to create sweaters and socks that keep the cold winters at bay, and in their numbers they represent wealth. Even if both Chileans speak the same language, their socialization will influence how they communicate and what they value, and their vocabulary will reflect these differences.

Let’s take this intranational comparison a step further. Within the same family, can there be intercultural communication? If all communication is intercultural, then the answer would be yes, but we still have to prove our case. Imagine a three-generation family living in one house. The grandparents may represent another time and different values from the grandchildren. The parents may have a different level of education and pursue different careers from the grandparents; the schooling the children are receiving may prepare them for yet another career. From music, to food preferences, to how work is done may vary across time; Elvis Presley may seem like ancient history to the children. The communication across generations represents intercultural communication, even if only to a limited degree.

But suppose we have a group of students who are all similar in age and educational level. Do gender and the societal expectations of roles influence interaction? Of course. And so we see that among these students not only do the boys and girls communicate in distinct ways but also not all boys and girls are the same. With a group of sisters, there may be common characteristics, but they will still have differences, and these differences contribute to intercultural communication. We are each shaped by our upbringing and it influences our worldview, what we value, and how we interact with each other. We create culture, and it creates us.

Everett Rogers and Thomas Steinfatt define intercultural communication as the exchange of information between individuals who are "unalike culturally" (Rogers, E. and Steinfatt, T., 1999). If you follow our discussion and its implications, you may arrive at the idea that ultimately we are each a "culture of one"—we are simultaneously a part of a community and its culture(s) and separate from it in the unique combination that represents us as an individual. All of us are separated by a matter of degrees from each other even if we were raised on the same street or by parents of similar educational background and profession, and yet, we have many other things in common.

Communication with yourself is called intrapersonal communication, which may also be intracultural, as you may only represent one culture. But most people belong to many groups, each with their own culture. Within our imaginary intergenerational home, how many cultures do you think we might find? If we only consider the parents and consider work one culture, and family another, we now have two. If we were to examine the options more closely, we would find many more groups, and the complexity would grow exponentially. Does a conversation with yourself ever involve competing goals, objectives, needs, wants, or values? How did you learn of those goals, or values? Through communication within and between individuals, they themselves representatives of many cultures. We struggle with the demands of each group and their expectations and could consider this internal struggle intercultural conflict or simply intercultural communication.

Culture is part of the very fabric of our thought, and we cannot separate ourselves from it, even as we leave home, defining ourselves anew in work and achievements. Every business or organization has a culture, and within what may be considered a global culture, there are many subcultures or co-cultures. For example, consider the difference between the sales and accounting departments in a corporation. We can quickly see two distinct groups with their own symbols, vocabulary, and values. Within each group, there may also be smaller groups, and each member of each department comes from a distinct background that in itself influences behavior and interaction.

Intercultural communication is a fascinating area of study within business communication, and it is essential to your success. One idea to keep in mind as we examine this topic is the importance of considering multiple points of view. If you tend to dismiss ideas or views that are "unalike culturally," you will find it challenging to learn about diverse cultures. If you cannot learn, how can you grow and be successful?

Ethnocentrism is the tendency to view other cultures as inferior to one's own. Having pride in your culture can be healthy, but history has taught us that having a predisposition to discount other cultures simply because they are different can be hurtful, damaging, and dangerous. Ethnocentrism makes us far less likely to be able to bridge the gap with others and often increases intolerance of difference. Business and industry are no longer regional, and in your career, you will necessarily cross borders, languages, and cultures. You will need tolerance, understanding, patience, and openness to difference. A skilled business communicator knows that the process of learning is never complete, and being open to new ideas is a key strategy for success.

Key Takeaway

Intercultural communication is an aspect of all communicative interactions, and attention to your perspective is key to your effectiveness. Ethnocentrism is a major obstacle to intercultural communication.

Exercises

1. Please list five words to describe your dominant culture. Please list five words to describe a culture with which you are not a member, have little or no contact, or have limited knowledge. Now, compare and contrast the terms noting their inherent value statements.
2. Identify a country you would like to visit. Research the country and find one interesting business fact and share it with the class.
3. Write a brief summary about a city, region, state, or country you have visited that is not like where you live. Share and compare with classmates.

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1.2.2: How to Understand Intercultural Communication

Learning Objectives

1. Describe strategies to understand intercultural communication, prejudice, and ethnocentrism.

The American anthropologist Edward T. Hall is often cited as a pioneer in the field of intercultural communication (Chen, G. and Starosta, W., 2000). Born in 1914, Hall spent much of his early adulthood in the multicultural setting of the American Southwest, where Native Americans, Spanish-speakers, and descendents of pioneers came together from diverse cultural perspectives. He then traveled the globe during World War II and later served as a U.S. State Department official. Where culture had once been viewed by anthropologists as a single, distinct way of living, Hall saw how the perspective of the individual influences interaction. By focusing on interactions rather than cultures as separate from individuals, he asked us to evaluate the many cultures we ourselves belong to or are influenced by as well as those with whom we interact. While his view makes the study of intercultural communication far more complex, it also brings a healthy dose of reality to the discussion. Hall is generally credited with eight contributions to our study of intercultural communication (Chen, G. and Starosta, W., 2000; Leeds-Hurwitz, W., 1990; McLean, S., 2005):

1. *Compare cultures*. Focus on the interactions versus general observations of culture.
2. *Shift to local perspective*. Local level versus global perspective.
3. *You don't have to know everything to know something*. Time, space, gestures, and gender roles can be studied, even if we lack a larger understanding of the entire culture.
4. *There are rules we can learn*. People create rules for themselves in each community that we can learn from, compare, and contrast.
5. *Experience counts*. Personal experience has value in addition to more comprehensive studies of interaction and culture.
6. *Perspectives can differ*. Descriptive linguistics serves as a model to understand cultures, and the U.S. Foreign Service adopted it as a base for training.
7. *Intercultural communication can be applied to international business*. U.S. Foreign Service training yielded applications for trade and commerce and became a point of study for business majors.
8. *It integrates the disciplines*. Culture and communication are intertwined and bring together many academic disciplines.

Hall shows us that emphasis on a culture as a whole, and how it operates, may lead us to neglect individual differences. Individuals may hold beliefs or practice customs that do not follow their own cultural norm. When we resort to the mental shortcut of a stereotype, we lose these unique differences. Stereotypes can be defined as a generalization about a group of people that oversimplifies their culture (Rogers, E. and Steinfatt, T., 1999).

The American psychologist Gordon Allport explored how, when, and why we formulate or use stereotypes to characterize distinct groups. His results may not surprise you. Look back at the third of the Note 18.1 "Introductory Exercises" for this chapter and examine the terms you used to describe a culture with which you are unfamiliar. Were the terms flattering or pejorative? Did they reflect respect for the culture or did they make unfavorable value judgments? Regardless of how you answered, you proved Allport's main point. When we do not have enough contact with people or their cultures to understand them well, we tend to resort to stereotypes (Allport, G., 1958).

As Hall notes, experience has value. If you do not know a culture, you should consider learning more about it firsthand if possible. The people you interact with may not be representative of the culture as a whole, but that is not to say that what you learn lacks validity. Quite the contrary; Hall asserts that you can, in fact, learn something without understanding everything, and given the dynamic nature of communication and culture, who is to say that your lessons will not serve you well? Consider a study abroad experience if that is an option for you, or learn from a classmate who comes from a foreign country or an unfamiliar culture. Be open to new ideas and experiences, and start investigating. Many have gone before you, and today, unlike in generations past, much of the information is accessible. Your experiences will allow you to learn about another culture and yourself, and help you to avoid prejudice.

Prejudice involves a negative preconceived judgment or opinion that guides conduct or social behavior (McLean, S., 2005). As an example, imagine two people walking into a room for a job interview. You are tasked to interview both, and having read the previous section, you know that Allport rings true when he says we rely on stereotypes when encountering people or cultures with which we have had little contact. Will the candidates' dress, age, or gender influence your opinion of them? Will their race or ethnicity be a conscious or subconscious factor in your thinking process? Allport's work would indicate that those factors and more will make you likely to use stereotypes to guide your expectations of them and your subsequent interactions with them.

People who treat other with prejudice often make assumptions, or take preconceived ideas for granted without question, about the group or communities. As Allport illustrated for us, we often assume characteristics about groups with which we have little contact. Sometimes we also assume similarity, thinking that people are all basically similar. This denies cultural, racial, ethnic, socioeconomic, and many other valuable, insightful differences.

Key Takeaway

Ethnocentric tendencies, stereotyping, and assumptions of similarity can make it difficult to learn about cultural differences.

Exercises

1. People sometimes assume that learning about other cultures is unnecessary if we simply treat others as we would like to be treated. To test this assumption, try answering the following questions.
   1. When receiving a gift from a friend, should you open it immediately, or wait to open it in private?
   2. When grocery shopping, should you touch fruits and vegetables to evaluate their freshness?
   3. In a conversation with your instructor or your supervisor at work, should you maintain direct eye contact?

   Write down your answers before reading further. Now let's explore how these questions might be answered in various cultures.

   1. In Chile, it is good manners to open a gift immediately and express delight and thanks. But in Japan it is a traditional custom to not open a gift in the giver's presence.
   2. In the United States, shoppers typically touch, hold, and even smell fruits and vegetables before buying them. But in northern Europe this is strongly frowned upon.
   3. In mainstream North American culture, people are expected to look directly at each other when having a conversation. But a cultural norm for many Native Americans involves keeping one's eyes lowered as a sign of respect when speaking to an instructor or supervisor.

   No one can be expected to learn all the "dos and don'ts" of the world's myriad cultures; instead, the key is to keep an open mind, be sensitive to other cultures, and remember that the way you'd like to be treated is not necessarily the way others would appreciate.
2. Please write a short paragraph where your perception of someone was changed once you got to know them. Share and compare with your classmates

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1.2.3: Common Cultural Characteristics

Learning Objectives

1. Understand the concept of common cultural characteristics and list several examples of such characteristics in your life.

While we may be members of many different cultures, we tend to adhere to some more than others. Perhaps you have become friendly with several of your fellow students as you've pursued your studies in college. As you take many of the same classes and share many experiences on campus, you begin to have more and more in common, in effect forming a small group culture of your own. A similar cultural formation process may happen in the workplace, where coworkers spend many hours each week sharing work experiences and getting to know each other socially in the process.

Groups come together, form cultures, and grow apart across time. How does one become a member of a community, and how do you know when you are full member? What aspects of culture do we have in common and how do they relate to business communication? Researchers who have studied cultures around the world have identified certain characteristics that define a culture. These characteristics are expressed in different ways, but they tend to be present in nearly all cultures. Let's examine them.

Rites of Initiation

Cultures tend to have a ritual for becoming a new member. A newcomer starts out as a nonentity, a stranger, an unaffiliated person with no connection or even possibly awareness of the community. Newcomers who stay around and learn about the culture become members. Most cultures have a rite of initiation that marks the passage of the individual within the community; some of these rituals may be so informal as to be hardly noticed (e.g., the first time a coworker asks you to join the group to eat lunch together), while others may be highly formalized (e.g., the ordination of clergy in a religion). The nonmember becomes a member, the new member becomes a full member, and individuals rise in terms of responsibility and influence.

Business communities are communities first, because without communication interaction, no business will occur. Even if sales and stock are processed by servers that link database platforms to flow, individuals are still involved in the maintenance, repair, and development of the system. Where there is communication, there is culture, and every business has several cultures.

Across the course of your life, you have no doubt passed several rites of initiation but may not have taken notice of them. Did you earn a driver's license, register to vote, or acquire the permission to purchase alcohol? In North American culture, these three common markers indicate the passing from a previous stage of life to a new one, with new rights and responsibilities. As a child, you were not allowed to have a driver's license. At age fourteen to eighteen, depending on your state and location (rural versus urban), you were allowed to drive a tractor, use farm equipment, operate a motor vehicle during daylight hours, or have full access to public roads. With the privilege of driving comes responsibility. It is your responsibility to learn what the signs and signals mean and to obey traffic laws for the common safety. In order for stop signs to work, we all have to agree on the behavior associated with them and observe that behavior.

Sometimes people choose to ignore a stop sign, or accidentally miss one, and it places the public in danger. Law enforcement officials reinforce that common safety as representatives of the culture, empowered by the people themselves based on a common agreement of what a stop sign means and what a driver is supposed to do when approaching one. Some people may argue that law enforcement serves some while it prosecutes others. This point of debate may deserve some consideration, but across cultures, there are rules, signs, and symbols that we share.

Rites of initiation mark the transition of the role or status of the individual within the group. Your first day on the job may have been a challenge as you learned your way around the physical space, but the true challenge was to learn how the group members communicate with each other. If you graduate from college with a Master of Business Administration (MBA) degree, you will already have passed a series of tests, learned terms and theories, and possess a symbol of accomplishment in your diploma, but that only grants you the opportunity to look for a job—to seek access to a new culture.

In every business, there are groups, power struggles, and unspoken ways that members earn their way from the role of a "newbie" to that of a full member. The newbie may get the tough account, the office without a window, or the cubicle next to the bathroom, denoting low status. As the new member learns to navigate through the community—establishing a track record and being promoted—he passes the rite of initiation and acquires new rights and responsibilities.

Over time, the person comes to be an important part of the business, a "keeper of the flame." The "flame" may not exist in physical space or time, but it does exist in the minds of those members in the community who have invested time and effort in the business. It is not a flame to be trusted to a new person, as it can only be earned with time. Along the way, there may be personality conflicts and power struggles over resources and perceived scarcity (e.g., there is only one promotion and everyone wants it). All these challenges are to be expected in any culture.

Common History and Traditions

Think for a moment about the history of a business like Ford Motor Company—what are your associations with Henry Ford, the assembly line manufacturing system, or the Model T? Or the early days of McDonald's? Do you have an emotional response to mental images of the "golden arches" logo, Ronald McDonald, or the Big Mac sandwich? Traditions form as the organization grows and expands, and stories are told and retold to educate new members on how business should be conducted. The history of every culture, of every corporation, influences the present. There are times when the phrase "we've tried that before" can become stumbling block for members of the organization as it grows and adapts to new market forces. There may be struggles between members who have weathered many storms and new members, who come armed with new educational perspectives, technological tools, or experiences that may contribute to growth.

Common Values and Principles

Cultures all hold values and principles that are commonly shared and communicated from older members to younger (or newer) ones. Time and length of commitment are associated with an awareness of these values and principles, so that new members, whether they are socialized at home, in school, or at work, may not have a thorough understanding of their importance. For example, time (fast customer service) and cleanliness are two cornerstone values of the McDonald's corporation. A new employee may take these for granted, while a seasoned professional who inspects restaurants may see the continued need to reinforce these core values. Without reinforcement, norms may gradually change, and if this were the case it could fundamentally change the customer experience associated with McDonald's.

Common Purpose and Sense of Mission

Cultures share a common sense of purpose and mission. Why are we here and whom do we serve? These are fundamental questions of the human condition that philosophers and theologians all over the world have pondered for centuries. In business, the answers to these questions often address purpose and mission, and they can be found in mission and vision statements of almost every organization. Individual members will be expected to acknowledge and share the mission and vision, actualize them, or make them real through action. Without action, the mission and vision statements are simply an arrangement of words. As a guide to individual and group behavioral norms, they can serve as a powerful motivator and a call to action.

Common Symbols, Boundaries, Status, Language, and Rituals

Most of us learn early in life what a stop sign represents, but do we know what military stripes represent on a sleeve, or a ten-year service pin on a lapel, or a corner office with two windows? Cultures have common symbols that mark them as a group; the knowledge of what a symbol stands for helps to reinforce who is a group member and who is not. You may have a brand on your arm from your fraternity, or wear a college ring—symbols that represent groups you affiliate with temporarily, while you are a student. They may or may not continue to hold meaning to you when your college experience is over. Cultural symbols include dress, such as the Western business suit and tie, the Scottish kilt, or the Islamic headscarf. Symbols also include slogans or sayings, such as "you're in good hands" or "you deserve a break today." The slogan may serve a marketing purpose but may also embrace a mission or purpose within the culture. Family crests and clan tartan patterns serve as symbols of affiliation. Symbols can also be used to communicate rank and status within the group.

Space is another common cultural characteristic; it may be a nonverbal symbol that represents status and power. In most of the world's cultures, a person occupying superior status is entitled to a physically elevated position—a throne, a dais, a podium from which to address subordinates. Subordinates may be expected to bow, curtsy, or lower their eyes as a sign of respect. In business, the corner office may offer the best view with the most space. Movement from a cubicle to a private office may also be a symbol of transition within an organization, involving increased responsibility as well as power. Parking spaces, the kind of vehicle you drive, and the transportation allowance you have may also serve to communicate symbolic meaning within an organization.

The office serves our discussion on the second point concerning boundaries. Would you sit on your boss's desk or sit in his chair with your feet up on the desk in his presence? Most people indicate they would not, because doing so would communicate a lack of respect, violate normative space expectations, and invite retaliation. Still, subtle challenges to authority may arise in the workplace. A less than flattering photograph of the boss at the office party posted to the recreational room bulletin board communicates more than a lack of respect for authority. By placing the image anonymously in a public place, the prankster clearly communicates a challenge, even if it is a juvenile one. Movement from the cubicle to the broom closet may be the result for someone who is found responsible for the prank. Again, there are no words used to communicate meaning, only symbols, but those symbols represent significant issues.

Communities have their own vocabulary and way in which they communicate. Consider the person who uses a sewing machine to create a dress and the accountant behind the desk; both are professionals and both have specialized jargon used in their field. If they were to change places, the lack of skills would present an obstacle, but the lack of understanding of terms, how they are used, and what they mean would also severely limit their effectiveness. Those terms and how they are used are learned over time and through interaction. While a textbook can help, it cannot demonstrate use in live interactions. Cultures are dynamic systems that reflect the communication process itself.

Cultures celebrate heroes, denigrate villains, and have specific ways of completing jobs and tasks. In business and industry, the emphasis may be on effectiveness and efficiency, but the practice can often be "because that is the way we have always done it." Rituals serve to guide our performance and behavior and may be limited to small groups or celebrated across the entire company. A pink Cadillac has a special meaning for a Mary Kay cosmetics representative. How that car is received is ritualistic, recognizing current success while honoring past performances across the company.

Rituals can serve to bind a group together, or to constrain it. Institutions tend to formalize processes and then have a hard time adapting to new circumstances. While the core values or mission statement may hold true, the method of doing things that worked in the past may not be as successful as it once was. Adaptation and change can be difficult for individuals and companies, and yet all communities, cultures, and communication contexts are dynamic, or always changing. As much as we might like things to stay the same, they will always change—and we will change with (and be changed by) them.

Key Takeaway

All cultures have characteristics such as initiations, traditions, history, values and principles, purpose, symbols, and boundaries.

Exercises

1. Compile a list or group of pictures of symbols that characterize some of the cultural groups you belong to. Share and discuss your list with your classmates.
2. Compile a list of pictures or symbols that your group or community finds offensive. Share and compare with classmates.

1.2.4: Divergent Cultural Characteristics

Learning Objectives

1. Discuss divergent cultural characteristics and list several examples of such characteristics in the culture(s) you identify with.

We are not created equal. We are born light- or dark-skinned, to parents of education or parents without access to education, and we grow up short or tall, slender or stocky. Our life chances or options are in many ways determined by our birth. The Victorian "rags to riches" novels that Horatio Alger wrote promoted the ideal that individuals can overcome all obstacles, raising themselves up by their bootstraps. Some people do have amazing stories, but even if you are quick to point out that Microsoft founder Bill Gates became fabulously successful despite his lack of a college education, know that his example is exception, not the rule. We all may use the advantages of our circumstances to improve our lives, but the type and extent of those advantages vary greatly across the planet.

Cultures reflect this inequality, this diversity, and the divergent range of values, symbols, and meanings across communities. Can you tie a knot? Perhaps you can tie your shoes, but can you tie a knot to secure a line to a boat, to secure a heavy load on a cart or truck, or to bundle a bale of hay? You may not be able to, but if you were raised in a culture that place a high value on knot-tying for specific purposes, you would learn that which your community values. We all have viewpoints, but they are shaped by our interactions with our communities. Let's examine several points of divergence across cultures.

Individualistic versus Collectivist Cultures

People in individualistic cultures value individual freedom and personal independence, and cultures always have stories to reflect their values. You may recall the story of Superman, or John McLean in the Diehard series, and note how one person overcomes all obstacles. Through personal ingenuity, in spite of challenges, one person rises successfully to conquer or vanquish those obstacles. Sometimes there is an assist, as in basketball or football, where another person lends a hand, but still the story repeats itself again and again, reflecting the cultural viewpoint.

The Dutch researcher Geert Hofstede explored the concepts of individualism and collectivism across diverse cultures (Hofstede, G., 1982; Hofstede, G., 2001; Hofstede, G., 2005). He found that in individualistic cultures like the United States, people perceived their world primarily from their own viewpoint. They perceived themselves as empowered individuals, capable of making their own decisions, and able to make an impact on their own lives.

Cultural viewpoint is not an either/or dichotomy, but rather a continuum or range. You may belong to some communities that express individualistic cultural values, while others place the focus on a collective viewpoint. Collectivist cultures (Hofstede, G., 1982), including many in Asia and South America, focus on the needs of the nation, community, family, or group of workers. Ownership and private property is one way to examine this difference. In some cultures, property is almost exclusively private, while others tend toward community ownership. The collectively owned resource returns benefits to the community. Water, for example, has long been viewed as a community resource, much like air, but that has been changing as business and organizations have purchased water rights and gained control over resources. Public lands, such as parks, are often considered public, and individual exploitation of them is restricted. Copper, a metal with a variety of industrial applications, is collectively owned in Chile, with profits deposited in the general government fund. While public and private initiatives exist, the cultural viewpoint is our topic. How does someone raised in a culture that emphasizes the community interact with someone raised in a primarily individualistic culture? How could tensions be expressed and how might interactions be influenced by this point of divergence?

Explicit-Rule Cultures versus Implicit-Rule Cultures

Do you know the rules of your business or organization? Did you learn them from an employee manual or by observing the conduct of others? Your response may include both options, but not all cultures communicate rules in the same way. Carley Dodd discusses this difference and has found quite a range of difference. In an explicit-rule culture, where rules are clearly communicated so that everyone is aware of them, the guidelines and agenda for a meeting are announced prior to the gathering. In an implicit-rule culture, where rules are often understood and communicated nonverbally, there may be no agenda. Everyone knows why they are gathered and what role each member plays, even though the expectations may not be clearly stated. Power, status, and behavioral expectations may all be understood, and to the person from outside this culture, it may prove a challenge to understand the rules of the context.

Outsiders often communicate their "otherness" by not knowing where to stand, when to sit, or how to initiate a conversation if the rules are not clearly stated. While it may help to know that implicit-rule cultures are often more tolerant of deviation from the understood rules, the newcomer will be wise to learn by observing quietly—and to do as much research ahead of the event as possible.

Uncertainty-Accepting Cultures versus Uncertainty-Rejecting Cultures

When we meet each other for the first time, we often use what we have previously learned to understand our current context. We also do this to reduce our uncertainty. Some cultures, such as the United States and Britain, are highly tolerant of uncertainty, while others go to great lengths to reduce the element of surprise. Cultures in the Arab world, for example, are high in uncertainty avoidance; they tend to be resistant to change and reluctant to take risks. Whereas a U.S. business negotiator might enthusiastically agree to try a new procedure, the Egyptian counterpart would likely refuse to get involved until all the details are worked out.

Charles Berger and Richard Calabrese developed uncertainty reduction theory to examine this dynamic aspect of communication. Here are seven axioms of uncertainty:

1. There is a high level of uncertainty at first. As we get to know one another, our verbal communication increases and our uncertainty begins to decrease.
2. Following verbal communication, nonverbal communication increases, uncertainty continues to decrease, and more nonverbal displays of affiliation, like nodding one's head to indicate agreement, will start to be expressed.
3. When experiencing high levels of uncertainty, we tend to increase our information-seeking behavior, perhaps asking questions to gain more insight. As our understanding increases, uncertainty decreases, as does the information-seeking behavior.
4. When experiencing high levels of uncertainty, the communication interaction is not as personal or intimate. As uncertainty is reduced, intimacy increases.
5. When experiencing high levels of uncertainty, communication will feature more reciprocity, or displays of respect. As uncertainty decreases, reciprocity may diminish.
6. Differences between people increase uncertainty, while similarities decrease it.
7. Higher levels of uncertainty are associated with a decrease in the indication of liking the other person, while reductions in uncertainty are associated with liking the other person more.

Time Orientation

Edward T. Hall and Mildred Reed Hall state that monochronic time-oriented cultures consider one thing at a time, whereas polychronic time-oriented cultures schedule many things at one time, and time is considered in a more fluid sense. In monochromatic time, interruptions are to be avoided, and everything has its own specific time. Even the multitasker from a monochromatic culture will, for example, recognize the value of work first before play or personal time. The United States, Germany, and Switzerland are often noted as countries that value a monochromatic time orientation.

Polychromatic time looks a little more complicated, with business and family mixing with dinner and dancing. Greece, Italy, Chile, and Saudi Arabia are countries where one can observe this perception of time; business meetings may be scheduled at a fixed time, but when they actually begin may be another story. Also note that the dinner invitation for 8 p.m. may in reality be more like 9 p.m. If you were to show up on time, you might be the first person to arrive and find that the hosts are not quite ready to receive you.

When in doubt, always ask before the event; many people from polychromatic cultures will be used to foreigner's tendency to be punctual, even compulsive, about respecting established times for events. The skilled business communicator is aware of this difference and takes steps to anticipate it. The value of time in different cultures is expressed in many ways, and your understanding can help you communicate more effectively.

Short-Term versus Long-Term Orientation

Do you want your reward right now or can you dedicate yourself to a long-term goal? You may work in a culture whose people value immediate results and grow impatient when those results do not materialize. Geert Hofstede discusses this relationship of time orientation to a culture as a "time horizon," and it underscores the perspective of the individual within a cultural context. Many countries in Asia, influenced by the teachings of Confucius, value a long-term orientation, whereas other countries, including the United States, have a more short-term approach to life and results. Native American cultures are known for holding a long-term orientation, as illustrated by the proverb attributed to the Iroquois that decisions require contemplation of their impact seven generations removed.

If you work within a culture that has a short-term orientation, you may need to place greater emphasis on reciprocation of greetings, gifts, and rewards. For example, if you send a thank-you note the morning after being treated to a business dinner, your host will appreciate your promptness. While there may be a respect for tradition, there is also an emphasis on personal representation and honor, a reflection of identity and integrity. Personal stability and consistency are also valued in a short-term oriented culture, contributing to an overall sense of predictability and familiarity.

Long-term orientation is often marked by persistence, thrift and frugality, and an order to relationships based on age and status. A sense of shame for the family and community is also observed across generations. What an individual does reflects on the family and is carried by immediate and extended family members.

Masculine versus Feminine Orientation

There was a time when many cultures and religions valued a female figurehead, and with the rise of Western cultures we have observed a shift toward a masculine ideal. Each carries with it a set of cultural expectations and norms for gender behavior and gender roles across life, including business.

Hofstede describes the masculine-feminine dichotomy not in terms of whether men or women hold the power in a given culture, but rather the extent to which that culture values certain traits that may be considered masculine or feminine. Thus, “the assertive pole has been called ‘masculine’ and the modest, caring pole ‘feminine.’ The women in feminine countries have the same modest, caring values as the men; in the masculine countries they are somewhat assertive and competitive, but not as much as the men, so that these countries show a gap between men’s values and women’s values” (Hofstede, G., 2009).

We can observe this difference in where people gather, how they interact, and how they dress. We can see it during business negotiations, where it may make an important difference in the success of the organizations involved. Cultural expectations precede the interaction, so someone who doesn’t match those expectations may experience tension. Business in the United States has a masculine orientation—assertiveness and competition are highly valued. In other cultures, such as Sweden, business values are more attuned to modesty (lack of self-promotion) and taking care of society’s weaker members. This range of difference is one aspect of intercultural communication that requires significant attention when the business communicator enters a new environment.

Direct versus Indirect

In the United States, business correspondence is expected to be short and to the point. “What can I do for you?” is a common question when a business person receives a call from a stranger; it is an accepted way of asking the caller to state his or her business. In some cultures it is quite appropriate to make direct personal observation, such as “You’ve changed your hairstyle,” while for others it may be observed, but never spoken of in polite company. In indirect cultures, such as those in Latin America, business conversations may start with discussions of the weather, or family, or topics other than business as the partners gain a sense of each other, long before the topic of business is raised. Again, the skilled business communicator researches the new environment before entering it, as a social faux pas, or error, can have a significant impact.

Materialism versus Relationships

Does the car someone drives say something about them? You may consider that many people across the planet do not own a vehicle and that a car or truck is a statement of wealth. But beyond that, do the make and model reflect their personality? If you are from a materialistic culture, you may be inclined to say yes. If you are from a culture that values relationships rather than material objects, you may say no or focus on how the vehicle serves the family. From rocks that display beauty and wealth—what we call jewelry—to what you eat—will it be lobster ravioli or prime rib?—we express our values and cultural differences with our purchase decisions.

Members of a materialistic culture place emphasis on external goods and services as a representation of self, power, and social rank. If you consider the plate of food before you, and consider the labor required to harvest the grain, butcher the animal, and cook the meal, you are focusing more on the relationships involved with its production than the foods themselves. Caviar may be a luxury, and it may communicate your ability to acquire and offer a delicacy, but it also represents an effort. Cultures differ in how they view material objects and their relationship to them, and some value people and relationships more than the objects themselves. The United States and Japan are often noted as materialistic cultures, while many Scandinavian nations feature cultures that place more emphasis on relationships.

Low-Power versus High-Power Distance

How comfortable are you with critiquing your boss's decisions? If you are from a low-power distance culture, your answer might be "no problem." In low-power distance cultures, according to Hofstede, people relate to one another more as equals and less as a reflection of dominant or subordinate roles, regardless of their actual formal roles as employee and manager, for example.

In a high-power distance culture, you would probably be much less likely to challenge the decision, to provide an alternative, or to give input. If you are working with people from a high-power distance culture, you may need to take extra care to elicit feedback and involve them in the discussion because their cultural framework may preclude their participation. They may have learned that less powerful people must accept decisions without comment, even if they have a concern or know there is a significant problem. Unless you are sensitive to cultural orientation and power distance, you may lose valuable information.

Key Takeaway

Cultures have distinct orientations when it comes to rules, uncertainty, time and time horizon, masculinity, directness, materialism, and power distance.

Exercises

1. Take a business letter or a page of a business report from a U.S. organization and try rewriting it as someone from a highly indirect, relational culture might have written it. Share and discuss your result with your classmates.
2. Conduct an online search for translated movie titles. Share and compare your results with your classmates.
3. Consider the movie you noted in the first of the Note 18.1 "Introductory Exercises" for this chapter. In what ways does it exemplify this individualistic viewpoint? Share your observations with your classmates.
4. Think of a movie where one or more characters exemplify individualism. Write a brief statement and share with classmates.
5. Think of a movie where one or more characters exemplify community-oriented values. Write a brief statement and share with classmates.

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1.2.5: International Communication and the Global Marketplace

Learning Objectives

1. Describe international communication and the global marketplace, including political, legal, economic, and ethical systems.

People create systems that reflect cultural values. These systems reduce uncertainty for the culture, creating and perpetuating the rules and customs, but may prove a significant challenge to the entrepreneur entering a new market. Political, legal, economic, and ethical systems vary from culture to culture, and may or may not reflect formal boundaries. For example, disputes over who controls what part of their shoreline are common and are still a matter of debate, interpretation, and negotiation in many countries.

To a large extent, a country's culture is composed of formal systems. Formal systems often direct, guide, constrain, or promote some behaviors over others. A legal system, like taxation, may favor the first-time homebuyer in the United States, and as a consequence, home ownership may be pursued instead of other investment strategies. That same legal system, via tariffs, may levy import taxes on specific goods and services, and reduce their demand as the cost increases. Each of these systems reinforces or discourages actions based on cultural norms, creating regulations that reflect ways that each culture, through its constituents, views the world.

In this section, we'll examine intercultural communication from the standpoint of international communication. International communication can be defined as communication between nations, but we recognize that nations do not exist independent of people. International communication is typically government to government or, more accurately, governmental representatives to governmental representatives. It often involves topics and issues that relate to the nations as entities, broad issues of trade, and conflict resolution. People use political, legal, and economic systems to guide and regulate behavior, and diverse cultural viewpoints necessarily give rise to many variations. Ethical systems also guide behavior, but often in less formal, institutional ways. Together these areas form much of the basis of international communication, and warrant closer examination.

Political Systems

You may be familiar with democracy, or rule by the people; and theocracy, or rule of God by his or her designates; but the world presents a diverse range of how people are governed. It is also important to note, as we examine political systems, that they are created, maintained, and changed by people. Just as people change over time, so do all systems that humans create. A political climate that was once closed to market forces, including direct and indirect investment, may change over time.

Centuries ago, China built a physical wall to keep out invaders. In the twentieth century, it erected another kind of wall: a political wall that separated the country from the Western world and limited entrepreneurship due to its adherence to its interpretation of communism. In 2009, that closed market is now open for business. To what extent it is open may be a point of debate, but simple observation provides ample evidence of a country, and a culture, open to investment and trade. The opening and closing ceremonies for the 2008 Olympic Games in Beijing symbolized this openness, with symbolic representations of culture combined with notable emphasis on welcoming the world. As the nature of global trade and change transforms business, so it also transforms political systems.

Political systems are often framed in terms of how people are governed, and the extent to which they may participate. Democracy is one form of government that promotes the involvement of the individual, but even here we can observe stark differences. In the United States, people are encouraged to vote, but it is not mandatory, and voter turnout is often so low that voting minorities have great influence on the larger political systems. In Chile, voting is mandatory, so that all individuals are expected to participate, with adverse consequences if they do not. This doesn't mean there are not still voting minorities or groups with disproportionate levels of influence and power, but it does underscore cultural values and their many representations.

Centralized rule of the people also comes in many forms. In a dictatorship, the dictator establishes and enforces the rules with few checks and balances, if any. In a totalitarian system, one party makes the rules. The Communist states of the twentieth century (although egalitarian in theory) were ruled in practice by a small central committee. In a theocracy, one religion makes the rules based on their primary documents or interpretation of them, and religious leaders hold positions of political power. In each case, political power is centralized to a small group over the many.

A third type of political system is anarchy, in which there is no government. A few places in the world, notably Somalia, may be said to exist in a state of anarchy. But even in a state of anarchy, the lack of a central government means that local warlords, elders, and others exercise a certain amount of political, military, and economic power. The lack of an established governing system itself creates the need for informal power structures that regulate behavior and conduct, set and promote ideals, and engage in commerce and trade, even if that engagement involves nonstandard strategies such as the appropriation of ships via piracy. In the absence of appointed or elected leaders, emergent leaders will rise as people attempt to meet their basic needs.

Legal Systems

Figure 1.2.5.2: Communication varies across cultures, including legal and economic norms and customs. Wikimedia Commons – CC BY 2.0.

Legal systems also vary across the planet and come in many forms. Some legal systems promote the rule of law while others promote the rule of culture, including customs, traditions, and religions. The two most common systems are civil and common law. Civil law draws from a Roman history and common law from an English tradition. In civil law the rules are spelled out in detail, and judges are responsible for applying the law to the given case. In common law, the judge interprets the law and considers the concept of precedent, or previous decisions. Common law naturally adapts to changes in technology and modern contexts as precedents accumulate, while civil law requires new rules to be written out to reflect the new context even as the context transforms and changes. Civil law is more predictable and is practiced in the majority of countries, while common law involves more interpretation that can produce conflict with multiple views on the application of the law in question. The third type of law draws its rules from a theological base rooted in religion. This system presents unique challenges to the outsider, and warrants thorough research.

Economic Systems

Economic systems vary in similar ways across cultures, and again reflect the norms and customs of people. Economies are often described on the relationship between people and their government. An economy with a high degree of government intervention may prove challenging for both internal and external businesses. An economy with relatively little government oversight may be said to reflect more of the market(s) and to be less restricted. Along these same lines, government may perceive its role as a representative of the common good, to protect individual consumers, and to prevent fraud and exploitation.

This continuum or range, from high to low degrees of government involvement, reflects the concept of government itself. A government may be designed to give everyone access to the market, with little supervision, in the hope that people will regulate transactions based on their own needs, wants, and desires; in essence, their own self-interest. If everyone operates in one’s self-interest and word gets out that one business produces a product that fails to work as advertised, it is often believed that the market will naturally gravitate away from this faulty product to a competing product that works properly. Individual consumers, however, may have a hard time knowing which product to have faith in and may look to government to provide that measure of safety.

Government certification of food, for example, attempts to reduce disease. Meat from unknown sources would lack the seal of certification, alerting the consumer to evaluate the product closely or choose another product. In terms of supervision, we can see an example of this when Japan restricts the sale of U.S. beef for fear of mad cow disease. The concern may be warranted from the consumer’s viewpoint, or it may be protectionist from a business standpoint, protecting the local producer over the importer.

From meat to financial products, we can see both the dangers and positive attributes of intervention and can also acknowledge that its application may be less than consistent. Some cultures that value the community may naturally look to their government for leadership in economic areas, while those that represent an individualistic tendency may take a more “hands off” approach.

Ethical Systems

Ethical systems, unlike political, legal, and economic systems, are generally not formally institutionalized. This does not imply, however, that they are less influential in interactions, trade, and commerce. Ethics refers to a set of norms and principles that relate to individual and group behavior, including businesses and organizations. They may be explicit, in the form of an organization’s code of conduct; may be represented in religion, as in the Ten Commandments; or may reflect cultural values in law. What is legal and what is ethical are at times quite distinct.

For example, the question of executive bonuses was hotly debated when several U.S. financial services companies accepted taxpayer money under the Troubled Assets Relief Program (TARP) in 2008. It was legal for TARP recipient firms to pay bonuses—indeed, some lawyers argued that failing to pay promised bonuses would violate contract law—but many taxpayers believed it was unethical.

Some cultures have systems of respect and honor that require tribute and compensation for service, while others may view payment as a form of bribe. It may be legal in one country to make a donation or support a public official in order to gain influence over a decision, but it may be unethical. In some countries, it may be both illegal and unethical. Given the complexity of human values and their expression across behaviors, it is wise to research the legal and ethical norms of the place or community where you want to do business.

Global Village

International trade has advantages and disadvantages, again based on your viewpoint and cultural reference. If you come from a traditional culture, with strong gender norms and codes of conduct, you may not appreciate the importation of some Western television programs that promote what you consider to be content that contradicts your cultural values. You may also take the viewpoint from a basic perspective and assert that basic goods and services that can only be obtained through trade pose a security risk. If you cannot obtain the product or service, it may put you, your business, or your community at risk.

Furthermore, “just in time” delivery methods may produce shortages when the systems break down due to weather, transportation delays, or conflict. People come to know each other through interactions (and transactions are fundamental to global trade), but cultural viewpoints may come into conflict. Some cultures may want a traditional framework to continue and will promote their traditional cultural values and norms at the expense of innovation and trade. Other cultures may come to embrace diverse cultures and trade, only to find that they have welcomed some who wish to do harm. In a modern world, transactions have a cultural dynamic that cannot be ignored.

Intercultural communication and business have been related since the first exchange of value. People, even from the same community, had to arrive at a common understanding of value. Symbols, gestures, and even language reflect these values. Attention to this central concept will enable the skilled business communicator to look beyond his or her own viewpoint.

It was once the privilege of the wealthy to travel, and the merchant or explorer knew firsthand what many could only read about. Now we can take virtual tours of locations we may never travel to, and as the cost of travel decreases, we can increasingly see the world for ourselves. As global trade has developed, and time to market has decreased, the world has effectively grown smaller. While the size has not changed, our ability to navigate has been dramatically decreased. Time and distance are no longer the obstacles they once were. The Canadian philosopher Marshall McLuhan, a pioneer in the field of communication, predicted what we now know as the “global village.” The global village is characterized by information and transportation technologies that reduce the time and space required to interact (McLuhan, M., 1964).

Key Takeaway

People create political, legal, economic, and ethical systems to guide them in transacting business domestically and internationally.

Exercises

1. Choose one country you would like to visit and explore its political system. How is it different from the system in your country? What are the similarities? Share your findings with classmates.

2. Think of an ethical aspect of the economic crisis of 2008 that involved you or your family. For example, did you or a relative get laid off at work, have difficulty making mortgage or rent payments, change your spending habits, or make donations to help those less fortunate? Is there more than one interpretation of the ethics of the situation? Write a short essay about it and discuss it with your classmates.
3. Choose one country you would like to visit and explore its economic system, including type of currency and its current value in relation to the U.S. dollar. Share and compare your results with classmates.

1.2.6: Styles of Management

Learning Objectives

1. Understand and discuss how various styles of management, including Theory X, Y, and Z, influence workplace culture.

People and their relationships to dominant and subordinate roles are a reflection of culture and cultural viewpoint. They are communicated through experience and create expectations for how and when managers interact with employees. The three most commonly discussed management theories are often called X, Y, and Z. In this section we'll briefly discuss them and their relationship to intercultural communication.

Theory X

In an influential book titled *The Human Side of Enterprise*, M. I. T. management professor Douglas McGregor described two contrasting perceptions on how and why people work, formulating Theory X and Theory Y; they are both based on Maslow's hierarchy of needs (Maslow, A., 1954; Maslow, A., 1970). According to this model, people are concerned first with physical needs (e.g., food, shelter) and second with safety. At the third level, people seek love, acceptance, and intimacy. Self-esteem, achievement, and respect are the fourth level. Finally, the fifth level embodies self-actualization.

McGregor's Theory X asserts that workers are motivated by their basic (low-level) needs and have a general disposition against labor. In this viewpoint, workers are considered lazy and predicted to avoid work if they can, giving rise to the perceived need for constant, direct supervision. A Theory X manager may be described as authoritarian or autocratic, and does not seek input or feedback from employees. The view further holds that workers are motivated by personal interest, avoid discomfort, and seek pleasure. The Theory X manager uses control and incentive programs to provide punishment and rewards. Responsibility is the domain of the manager, and the view is that employees will avoid it if at all possible to the extent that blame is always deflected or attributed to something other than personal responsibility. Lack of training, inferior machines, or failure to provide the necessary tools are all reasons to stop working, and it is up to the manager to fix these issues.

Theory Y

In contrast to Theory X, Theory Y views employees as ambitious, self-directed, and capable of self-motivation. Employees have a choice, and they prefer to do a good job as a representation of self-actualization. The pursuit of pleasure and avoidance of pain are part of being human, but work is also a reward in itself and employees take pride in their efforts. Employees want to reach their fullest potential and define themselves by their profession. A job well done is reward in and of itself, and the employee may be a valuable source of feedback. Collaboration is viewed as normal, and the worker may need little supervision.

Theory Z

Theory X and Y may seem like two extremes across the range of management styles, but in fact they are often combined in actual work settings. William Ouchi's Theory Z combines elements of both, and draws from American and Japanese management style. It promotes worker participation and emphasizes job rotation, skills development, and loyalty to the company (Luthans, F., 1989). Workers are seen as having a high need for reinforcement, and belonging is emphasized. Theory Z workers are trusted to do their jobs with excellence and management is trusted to support them, looking out for their well-being (Massie J. and Douglas, J., 1992).

Each of these theories of management features a viewpoint with assumptions about people and why they do what they do. While each has been the subject of debate, and variations on each have been introduced across organizational communication and business, they serve as a foundation for understanding management in an intercultural context.

Key Takeaway

Management Theories X, Y, and Z are examples of distinct and divergent views on worker motivation, need for supervision, and the possibility of collaboration.

Exercises

1. Imagine that you are a manager in charge of approximately a dozen workers. Would you prefer to rely primarily on Theory X, Y, or Z as your management style? Why? Write a short essay defending your preference, giving some concrete examples of management decisions you would make. Discuss your essay with your classmates.

2. Describe your best boss and write a short analysis on what type of management style you perceive they used. Share and compare with classmates.
3. Describe your worst boss and write a short analysis on what type of management style you perceive they used. Share and compare with classmates.

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1.2.7: The International Assignment

Learning Objectives

1. Describe how to prepare for an international assignment.
2. Discuss the acculturation process as an expatriate.
3. Describe effective strategies for living and working abroad.

Suppose you have the opportunity to work or study in a foreign country. You may find the prospect of an international assignment intriguing, challenging, or even frightening; indeed, most professionals employed abroad will tell you they pass through all three stages at some point during the assignment. They may also share their sense of adjustment, even embrace of their host culture, and the challenges of reintegration into their native country.

An international assignment, whether as a student or a career professional, requires work and preparation, and should be given the time and consideration of any major life change. When you lose a loved one, it takes time to come to terms with the loss. When someone you love is diagnosed with a serious illness, the news may take some time to sink in. When a new baby enters your family, a period of adjustment is predictable and prolonged. All these major life changes can stress an individual beyond their capacity to adjust. Similarly, in order to be a successful "expat," or expatriate, one needs to prepare mentally and physically for the change.

International business assignments are a reflection of increased global trade, and as trade decreases, they may become an expensive luxury. As technology allows for instant face-to-face communication, and group collaboration on documents via cloud computing and storage, the need for physical travel may be reduced. But regardless of whether your assignment involves relocation abroad, supervision of managers in another country at a distance, or supervision by a foreign manager, you will need to learn more about the language, culture, and customs that are not your own. You will need to compare and contrast, and seek experiences that lend insight, in order to communicate more effectively.

An efficient, effective manager in any country is desirable, but one with international experience even more so. You will represent your company and they will represent you, including a considerable financial investment, either by your employer (in the case of a professional assignment) or by whoever is financing your education (in the case of studying abroad). That investment should not be taken lightly. As many as 40 percent of foreign-assigned employees terminate their assignments early (Tu, H. and Sullivan, S., 1994), at a considerable cost to their employers. Of those that remain, almost 50 percent are less than effective (Tu, H. and Sullivan, S., 1994).

Preparation

With this perspective in mind, let's discuss how to prepare for the international assignment and strategies to make you a more effective professional as a stranger in a strange land. First we'll dispel a couple of myths associated with an idealized or romantic view of living abroad. Next we'll examine traits and skills of the successful expatriate. Finally, we'll examine culture shock and the acculturation process.

Your experience with other cultures may have come firsthand, but for most, a foreign location like Paris is an idea formed from exposure to images via the mass media. Paris may be known for its art, as a place for lovers, or as a great place to buy bread. But if you have only ever known about a place through the lens of a camera, you have only seen the portraits designed and portrayed by others. You will lack the multidimensional view of one who lives and works in Paris, and even if you are aware of its history, its economic development, or its recent changes, these are all academic observations until the moment of experience.

That is not to say that research does not form a solid foundation in preparation for an international assignment, but it does reinforce the distinction between a media-fabricated ideal and real life. Awareness of this difference is an important step as you prepare yourself for life in a foreign culture.

If the decision is yours to make, take your time. If others are involved, and family is a consideration, you should take even more care with this important decision. Residence abroad requires some knowledge of the language, an ability to adapt, and an interest in learning about different cultures. If family members are not a part of the decision, or lack the language skills or interest, the assignment may prove overwhelming and lead to failure. Sixty-four percent of expatriate respondents who terminated their assignment early indicated that family concerns were the primary reason (Contreras, C. D., 2009).

Points to consider include the following:

- How flexible are you?
- Do you need everything spelled out or can you go with the flow?
- Can you adapt to new ways of doing business?
- Are you interested in the host culture and willing to dedicate the time and put forth the effort to learn more about it?
- What has been your experience to date working with people from distinct cultures?
- What are your language skills at present, and are you interested in learning a new language?
- Is your family supportive of the assignment?
- How will it affect your children's education? Your spouse's career? Your career?
- Will this assignment benefit your family?
- How long are you willing to commit to the assignment?
- What resources are available to help you prepare, move, and adjust?
- Can you stand being out of the loop, even if you are in daily written and oral communication with the home office?
- What is your relationship with your employer, and can it withstand the anticipated stress and tension that will result as not everything goes according to plan?
- Is the cultural framework of your assignment similar to—or unlike—your own, and how ready are you to adapt to differences in such areas as time horizon, masculinity versus femininity, or direct versus indirect styles of communication?

This list of questions could continue, and feel free to add your own as you explore the idea of an international assignment. An international assignment is not like a domestic move or reassignment. Within the same country, even if there are significantly different local customs in place, similar rules, laws, and ways of doing business are present. In a foreign country, you will lose those familiar traditions and institutions and have to learn many new ways of accomplishing your given tasks. What once took a five-minute phone call may now take a dozen meetings and a month to achieve, and that may cause you some frustration. It may also cause your employer frustration as you try to communicate how things are done locally, and why results are not immediate, as they lack even your limited understanding of your current context. Your relationship with your employer will experience stress, and your ability to communicate your situation will require tact and finesse.

Successful expatriates are adaptable, open to learning new languages, cultures, and skilled at finding common ground for communication. Rather than responding with frustration, they learn the new customs and find the advantage to get the job done. They form relationships and are not afraid to ask for help when it is warranted or required. They feel secure in their place as explorer, and understand that mistakes are a given, even as they are unpredictable. Being a stranger is no easy task, but they welcome the challenge with energy and enthusiasm.

Acculturation Process

Acculturation, or the transition to living abroad, is often described as an emotional rollercoaster. Steven Rhinesmith provides ten steps that show the process of acculturation, including culture shock, that you may experience:

1. Initial anxiety
2. Initial elation
3. Initial culture shock
4. Superficial adjustment
5. Depression-frustration
6. Acceptance of host culture
7. Return anxiety
8. Return elation
9. Reentry shock
10. Reintegration

Humans fear the unknown, and even if your tolerance for uncertainty is high, you may experience a degree of anxiety in anticipation of your arrival. At first the "honeymoon" period is observed, with a sense of elation at all the newfound wonders. You may adjust superficially at first, learning where to get familiar foods or new ways to meet your basic needs. As you live in the new culture, divergence will become a trend and you'll notice many things that frustrate you. You won't anticipate the need for two hours at a bank for a transaction that once took five minutes, or could be handled over the Internet, and find that businesses close during midday, preventing you from accomplishing your goals. At this stage, you will feel that living in this new culture is simply exhausting. Many expats advise that this is the time to tough it out—if you give in to the temptation to make a visit back home, you will only prolong your difficult adjustment.

Over time, if you persevere, you will come to accept and adjust to your host culture, and learn how to accomplish your goals with less frustration and ease. You may come to appreciate several cultural values or traits and come to embrace some aspects of your host culture. At some point, you will need to return to your first, or home, culture, but that transition will bring a sense of anxiety. People and places change, the familiar is no longer so familiar, and you too have changed. You may once again be elated at your return and the familiar, and experience a sense of comfort in home and family, but culture shock may again be part of your adjustment. You may look at your home culture in a new way and question things that are done in a particular way that you have always considered normal. You may hold onto some of the cultural traits you adopted while living abroad, and begin the process of reintegration.

Figure 1.2.7.1: The international assignment requires adaptability. JT – Euro Note Currency – CC BY-NC-ND 2.0.

You may also begin to feel that the “grass is greener” in your host country, and long to return. Expatriates are often noted for “going native,” or adopting the host culture’s way of life, but even the most confirmed expats still gather to hear the familiar sound of their first language, and find community in people like themselves who have blended cultural boundaries on a personal level.

Living and Working Abroad

In order to learn to swim you have to get in the water, and all the research and preparation cannot take the place of direct experience. Your awareness of culture shock may help you adjust, and your preparation by learning some of the language will assist you, but know that living and working abroad take time and effort. Still, there are several guidelines that can serve you well as you start your new life in a strange land:

1. *Be open and creative*. People will eat foods that seem strange or do things in a new way, and your openness and creativity can play a positive role in your adjustment. Staying close to your living quarters or surrounding yourself with similar expats can limit your exposure to and understanding of the local cultures. While the familiar may be comfortable, and the new setting may be uncomfortable, you will learn much more about your host culture and yourself if you make the effort to be open to new experiences. Being open involves getting out of your comfort zone.
2. *Be self-reliant*. Things that were once easy or took little time may now be challenging or consume your whole day. Focus on your ability to resolve issues, learn new ways to get the job done, and be prepared to do new things.
3. *Keep a balanced perspective*. Your host culture isn’t perfect. Humans aren’t perfect, and neither was your home culture. Each location and cultural community has strengths you can learn from if you are open to them.
4. *Be patient*. Take your time, and know a silent period is normal. The textbook language classes only provide a base from which you will learn how people who live in the host country actually communicate. You didn’t learn to walk in a day and won’t learn to successfully navigate this culture overnight either.
5. *Be a student and a teacher*. You are learning as the new member of the community, but as a full member of your culture, you can share your experiences as well.
6. *Be an explorer*. Get out and go beyond your boundaries when you feel safe and secure. Traveling to surrounding villages, or across neighboring borders, can expand your perspective and help you learn.

7. *Protect yourself*. Always keep all your essential documents, money, and medicines close to you, or where you know they will be safe. Trying to source a medicine in a country where you are not fluent in the language, or where the names of remedies are different, can be a challenge. Your passport is essential to your safety and you need to keep it safe. You may also consider vaccination records, birth certificates, or business documents in the same way, keeping them safe and accessible. You may want to consider a "bug-out bag," with all the essentials you need, including food, water, keys, and small tools, as an essential part of planning in case of emergency.

Key Takeaways

Preparation is key to a successful international assignment. Living and working abroad takes time, effort, and patience.

Exercises

1. Research one organization in a business or industry that relates to your major and has an international presence. Find a job announcement or similar document that discusses the business and its international activities. Share and compare with classmates.
2. Conduct a search on expat networks including online forum. Briefly describe your findings and share with classmates.
3. What would be the hardest part of an overseas assignment for you and why? What would be the easiest part of an overseas assignment for you and why?
4. Find an advertisement for an international assignment. Note the qualifications, and share with classmates.
5. Find an article or other first-person account of someone's experience on an international assignment. Share your results with your classmates.

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Tu, H., & Sullivan, S. (1994). *Business horizons*. Retrieved from findarticles.com/p/articles/mi_m1038/is_nl_v37/ai_14922926.

1.2.8: Additional Resources

Visit the Web site of culture scholar Edward T. Hall. www.edwardthall.com/index.html

Learn about intercultural awareness in the classroom by reading this article by Mark Pedelty — Pedelty, M. (2001). Self as Other: An Intercultural Performance Exercise. Multicultural Education, 8, 29-32.

Visit these sites to explore the history and traditions of some famous American businesses. http://corporate.ford.com/company/history.html; www.aboutmcdonalds.com/content/mcd/our_company/mcdonalds-history.html

Learn more about Geert Hofstede's research on culture by exploring his Web site. http://geert-hofstede.com/

Read advice from the U.S. Department of State on living abroad http://travel.state.gov/

Visit ExpatExchange: A World of Friends Abroad to learn about the opportunities, experiences, and emotions of people living and working in foreign countries and cultures worldwide. http://www.expatexchange.com/newsarchiveall.cfm

SECTION OVERVIEW

1.3: Group Communication, Teamwork, and Leadership

Thumbnail: pixabay.com/photos/men-emplo...eting-1979261/

1.3.1: What is a Group?

Learning Objectives

1. Define groups and teams.
2. Discuss how primary and secondary groups meet our interpersonal needs.
3. Discuss how groups tend to limit their own size and create group norms.

Let's get into a time machine and travel way, way back to join early humans in prehistoric times. Their needs are like ours today: they cannot exist or thrive without air, food, and water—and a sense of belonging. How did they meet these needs? Through cooperation and competition. If food scarcity was an issue, who got more and who got less? This serves as our first introduction to roles, status and power, and hierarchy within a group. When food scarcity becomes an issue, who gets to keep their spoon? In some Latin American cultures, having a job or earning a living is referred to by the slang term *cuchara*, which literally means "spoon" and figuratively implies food, safety, and security.

Now let's return to the present and enter a modern office. Cubicles define territories and corner offices denote status. In times of economic recession or slumping sales for the company, there is a greater need for cooperation, and there is competition for scarce resources. The loss of a "spoon"—or of one's cubicle—may now come in the form of a pink slip, but it is no less devastating.

We form self-identities through our communication with others, and much of that interaction occurs in a group context. A group may be defined as three or more individuals who affiliate, interact, or cooperate in a familial, social, or work context. Group communication may be defined as the exchange of information with those who are alike culturally, linguistically, and/or geographically. Group members may be known by their symbols, such as patches and insignia on a military uniform. They may be known by their use of specialized language or jargon; for example, someone in information technology may use the term "server" in reference to the Internet, whereas someone in the food service industry may use "server" to refer to the worker who takes customer orders in a restaurant. Group members may also be known by their proximity, as in gated communities. Regardless of how the group defines itself, and regardless of the extent to which its borders are porous or permeable, a group recognizes itself as a group. Humans naturally make groups a part of their context or environment.

Types of Groups in the Workplace

As a skilled business communicator, learning more about groups, group dynamics, management, and leadership will serve you well. Mergers, forced sales, downsizing, and entering new markets all call upon individuals within a business or organization to become members of groups. In the second of the Note 19.1 "Introductory Exercises" for this chapter, you were asked to list the professional (i.e., work-related) groups you interact with in order of frequency. What did your list include? Perhaps you noted your immediate coworkers, your supervisor and other leaders in your work situation, members of other departments with whom you communicate, and the colleagues who are also your personal friends during off-work times. Groups may be defined by function. They can also be defined, from a developmental viewpoint, by the relationships within them. Groups can also be discussed in terms of their relationship to the individual and the degree to which they meet interpersonal needs.

Some groups may be assembled at work to solve problems, and once the challenge has been resolved, they dissolve into previous or yet to be determined groups. Functional groups like this may be immediately familiar to you. You take a class in sociology from a professor of sociology, who is a member of the discipline of sociology. To be a member of a discipline is to be a disciple, and adhere to a common framework to for viewing the world. Disciplines involve a common set of theories that explain the world around us, terms to explain those theories, and have grown to reflect the advance of human knowledge. Compared to your sociology instructor, your physics instructor may see the world from a completely different perspective. Still, both may be members of divisions or schools, dedicated to teaching or research, and come together under the large group heading we know as the university.

In business, we may have marketing experts who are members of the marketing department, who perceive their tasks differently from a member of the sales staff or someone in accounting. You may work in the mailroom, and the mailroom staff is a group in itself, both distinct from and interconnected with the larger organization.

Figure 1.3.1.1: Groups and teams are an important part of business communication. plantronicsgermany – calisto_620_group_conference_crop – CC BY-ND 2.0.

Relationships are part of any group, and can be described in terms of status, power, control, as well as role, function, or viewpoint. Within a family, for example, the ties that bind you together may be common experiences, collaborative efforts, and even pain and suffering. The birth process may forge a relationship between mother and daughter, but it also may not. An adoption may transform a family. Relationships are formed through communication interaction across time, and often share a common history, values, and beliefs about the world around us.

In business, an idea may bring professionals together and they may even refer to the new product or service as their "baby," speaking in reverent tones about a project they have taken from the drawing board and "birthed" into the real world. As in family communication, work groups or teams may have challenges, rivalries, and even "birthing pains" as a product is developed, adjusted, adapted, and transformed. Struggles are a part of relationships, both in families and business, and form a common history of shared challenged overcome through effort and hard work.

Through conversations and a shared sense that you and your coworkers belong together, you meet many of your basic human needs, such as the need to feel included, the need for affection, and the need for control (Schutz, W., 1966). In a work context, "affection" may sound odd, but we all experience affection at work in the form of friendly comments like "good morning," "have a nice weekend," and "good job!" Our professional lives also fulfill more than just our basic needs (i.e., air, food, and water, as well as safety). While your work group may be gathered together with common goals, such as to deliver the mail in a timely fashion to the corresponding departments and individuals, your daily interactions may well go beyond this functional perspective.

In the same way, your family may provide a place for you at the table and meet your basic needs, but they also may not meet other needs. If you grow to understand yourself and your place in a way that challenges group norms, you will be able to choose which parts of your life to share and to withhold in different groups, and to choose where to seek acceptance, affection, and control.

Primary and Secondary Groups

There are fundamentally two types of groups that can be observed in many contexts, from church to school, family to work. These two types are primary and secondary groups. The hierarchy denotes the degree to which the group(s) meet your interpersonal needs. Primary groups meet most, if not all, of one's needs. Groups that meet some, but not all, needs are called secondary groups. Secondary groups often include work groups, where the goal is to complete a task or solve a problem. If you are a member of the sales department, your purpose is to sell.

In terms of problem solving, work groups can accomplish more than individuals can. People, each of whom have specialized skills, talents, experience, or education come together in new combinations with new challenges, find new perspectives to create unique approaches that they themselves would not have formulated alone.

Secondary groups may meet your need for professional acceptance and celebrate your success, but they may not meet your need for understanding and sharing on a personal level. Family members may understand you in ways that your coworkers cannot, and vice versa.

If Two’s Company and Three’s a Crowd, What Is a Group?

This old cliché refers to the human tendency to form pairs. Pairing is the most basic form of relationship formation; it applies to childhood best friends, college roommates, romantic couples, business partners, and many other dyads (two-person relationships). A group, by definition, includes at least three people. We can categorize groups in terms of their size and complexity.

When we discuss demographic groups as part of a market study, we may focus on large numbers of individuals that share common characteristics. If you are the producer of an ecologically innovative car such as the Smart ForTwo, and know your customers have an average of four members in their family, you may discuss developing a new model with additional seats. While the target audience is a group, car customers don’t relate to each other as a unified whole. Even if they form car clubs and have regional gatherings, a newsletter, and competitions at their local race tracks each year, they still subdivide the overall community of car owners into smaller groups.

The larger the group grows, the more likely it is to subdivide. Analysis of these smaller, or microgroups, is increasingly a point of study as the Internet allows individuals to join people of similar mind or habit to share virtually anything across time and distance. A microgroup is a small, independent group that has a link, affiliation, or association with a larger group. With each additional group member the number of possible interactions increases (Harris, T., and Sherblom, J., 1999; McLean, S., 2003).

Small groups normally contain between three and eight people. One person may involve intrapersonal communication, while two may constitute interpersonal communication, and both may be present within a group communication context. You may think to yourself before making a speech or writing your next post, and you may turn to your neighbor or coworker and have a side conversation, but a group relationship normally involves three to eight people, and the potential for distraction is great.

In Table 1.3.1.1, you can quickly see how the number of possible interactions grows according to how many people are in the group. At some point, we all find the possible and actual interactions overwhelming and subdivide into smaller groups. For example, you may have hundreds of friends on MySpace or Facebook, but how many of them do you regularly communicate with? You may be tempted to provide a number greater than eight, but if you exclude the “all to one” messages, such as a general tweet to everyone (but no one person in particular), you’ll find the group norms will appear.

Table 1.3.1.1 Possible Interaction in Groups

Number of Group Members	2	3	4	5	6	7	8
Number of Possible Interactions	2	9	28	75	186	441	1,056

Group norms are customs, standards, and behavioral expectations that emerge as a group forms. If you post an update every day on your Facebook page and your friends stop by to post on your wall and comment, not posting for a week will violate a group norm. They will wonder if you are sick or in the hospital where you have no access to a computer to keep them updated. If, however, you only post once a week, the group will come to naturally expect your customary post. Norms involve expectations that are self and group imposed and that often arise as groups form and develop.

If there are more than eight members, it becomes a challenge to have equal participation, where everyone has a chance to speak, listen, and respond. Some will dominate, others will recede, and smaller groups will form. Finding a natural balance within a group can also be a challenge. Small groups need to have enough members to generate a rich and stimulating exchange of ideas, information, and interaction, but not so many people that what each brings cannot be shared (Galanes, G., Adams, K., and Brilhart, J., 2000).

Key Takeaway

Forming groups fulfills many human needs, such as the need for affiliation, affection, and control; individuals also need to cooperate in groups to fulfill basic survival needs.

Exercises

1. Think of the online groups you participate in. Forums may have hundreds or thousands of members, and you may have hundreds of friends on MySpace or Facebook, but how many do you regularly communicate with? Exclude the “all-to-one” messages, such as a general tweet to everyone (but no one person in particular). Do you find that you gravitate toward the group norm of eight or fewer group members? Discuss your answer with your classmates.
2. What are some of the primary groups in your life? How do they compare with the secondary groups in your life? Write a two- to three-paragraph description of these groups and compare it with a classmate’s description.
3. What group is most important to people? Create a survey with at least two questions, identify a target sample size, and conduct your survey. Report how you completed the activity and your findings. Compare the results with those of your classmates.
4. Are there times when it is better to work alone rather than in a group? Why or why not? Discuss your opinion with a classmate.

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1.3.2: Group Life Cycles and Member Roles

Learning Objectives

1. Identify the typical stages in the life cycle of a group.
2. Describe different types of group members and group member roles.

Groups are dynamic systems in constant change. Groups grow together and eventually come apart. People join groups and others leave. This dynamic changes and transforms the very nature of the group. Group socialization involves how the group members interact with one another and form relationships. Just as you were once born and changed your family, they changed you. You came to know a language and culture, a value system, and set of beliefs that influence you to this day. You came to be socialized, to experience the process of learning to associate, communicate, or interact within a group. A group you belong to this year—perhaps a soccer team or the cast of a play—may not be part of your life next year. And those who are in leadership positions may ascend or descend the leadership hierarchy as the needs of the group, and other circumstances, change over time.

Group Life Cycle Patterns

Your life cycle is characterized with several steps, and while it doesn't follow a prescribed path, there are universal stages we can all recognize. You were born. You didn't choose your birth, your parents, your language, or your culture, but you came to know them through communication. You came to know yourself, learned skills, discovered talents, and met other people. You learned, worked, lived, and loved, and as you aged, minor injuries took longer to heal. You competed in ever-increasing age groups in your favorite sport, and while your time for each performance may have increased as you aged, your experience allowed you to excel in other ways. Where you were once a novice, you have now learned something to share. You lived to see some of your friends pass before you, and the moment will arrive when you too must confront death.

In the same way, groups experience similar steps and stages and take on many of the characteristics we associate with life (Moreland, R. and Levine, J., 1982). They grow, overcome illness and dysfunction, and transform across time. No group, just as no individual, lives forever.

Your first day on the job may be comparable to the first day you went to school. At home, you may have learned some of the basics, like how to write with a pencil, but knowledge of that skill and its application are two different things. In school, people spoke and acted in different ways than at home. Gradually, you came to understand the meaning of recess, the importance of raising your hand to get the teacher's attention, and how to follow other school rules. At work, you may have had academic training for your profession, but the knowledge you learned in school only serves as your foundation—much as your socialization at home served to guide you at school. On the job they use jargon terms, have schedules that may include coffee breaks (recess), have a supervisor (teacher), and have rules, explicit and understood. On the first day, it was all new, even if many of the elements were familiar.

In order to better understand group development and its life cycle, many researchers have described the universal stages and phases of groups. While there are modern interpretations of these stages, most draw from the model proposed by Bruce Tuckman. This model, shown in Table $1.3.2.1$, specifies the usual order of the phases of group development, and allows us to predict several stages we can anticipate as we join a new group.

Table $1.3.2.1$: Tuckman's Linear Model of Group Development

Stages	Activities
Forming	Members come together, learn about each other, and determine the purpose of the group.
Storming	Members engage in more direct communication and get to know each other. Conflicts between group members will often arise during this stage.
Norming	Members establish spoken or unspoken rules about how they communicate and work. Status, rank, and roles in the group are established.
Performing	Members fulfill their purpose and reach their goal.
Adjourning	Members leave the group.

Tuckman begins with the forming stage as the initiation of group formation. This stage is also called the orientation stage because individual group members come to know each other. Group members who are new to each other and can't predict each other's behavior can be expected to experience the stress of uncertainty. Uncertainty theory states that we choose to know more about others with whom we have interactions in order to reduce or resolve the anxiety associated with the unknown (Berger, C. and Calabrese, R., 1975; Berger, C., 1986; Gudykunst, W., 1995). The more we know about others and become accustomed to how they communicate, the better we can predict how they will interact with us in future contexts. If you learn that Monday mornings are never a good time for your supervisor, you quickly learn to schedule meetings later in the week. Individuals are initially tentative and display caution as they begin to learn about the group and its members.

If you don't know someone very well, it is easy to offend. Each group member brings to the group a set of experiences, combined with education and a self-concept. You won't be able to read this information on a nametag, but instead you will only come to know it through time and interaction. Since the possibility of overlapping and competing viewpoints and perspectives exists, the group will experience a storming stage, a time of struggles as the members themselves sort out their differences. There may be more than one way to solve the problem or task at hand, and some group members may prefer one strategy over another. Some members of the group may be more senior to the organization than you, and members may treat them differently. Some group members may be as new as you are and just as uncertain about everyone's talents, skills, roles, and self-perceptions. The wise business communicator will anticipate the storming stage and help facilitate opportunities for the members to resolve uncertainty before the work commences. There may be challenges for leadership, and conflicting viewpoints. The sociology professor sees the world differently than the physics professor. The sales agent sees things differently than someone from accounting. A manager who understands and anticipates this normal challenge in the group's life cycle can help the group become more productive.

A clear definition of the purpose and mission of the group can help the members focus their energies. Interaction prior to the first meeting can help reduce uncertainty. Coffee and calories can help bring a group together. Providing the group with what they need and opportunities to know each other prior to their task can increase efficiency.

Groups that make a successful transition from the storming stage will next experience the norming stage, where the group establishes norms, or informal rules, for behavior and interaction. Who speaks first? Who takes notes? Who is creative, who is visual, and who is detail-oriented? Sometimes our job titles and functions speak for themselves, but human beings are complex. We are not simply a list of job functions, and in the dynamic marketplace of today's business environment you will often find that people have talents and skills well beyond their "official" role or task. Drawing on these strengths can make the group more effective.

The norming stage is marked by less division and more collaboration. The level of anxiety associated with interaction is generally reduced, making for a more positive work climate that promotes listening. When people feel less threatened and their needs are met, they are more likely to focus their complete attention on the purpose of the group. If they are still concerned with who does what, and whether they will speak in error, the interaction framework will stay in the storming stage. Tensions are reduced when the normative expectations are known, and the degree to which a manager can describe these at the outset can reduce the amount of time the group remains in uncertainty. Group members generally express more satisfaction with clear expectations and are more inclined to participate.

Ultimately, the purpose of a work group is performance, and the preceding stages lead us to the performing stage, in which the group accomplishes its mandate, fulfills its purpose, and reaches its goals. To facilitate performance, group members can't skip the initiation of getting to know each other or the sorting out of roles and norms, but they can try to focus on performance with clear expectations from the moment the group is formed. Productivity is often how we measure success in business and industry, and the group has to produce. Outcome assessments may have been built into the system from the beginning to serve as a benchmark for success. Wise managers know how to celebrate success, as it brings more success, social cohesion, group participation, and a sense of job satisfaction. Incremental gains toward a benchmark may also be cause for celebration and support, and failure to reach a goal should be regarded as an opportunity for clarification.

It is generally wiser to focus on the performance of the group rather than individual contributions. Managers and group members will want to offer assistance to underperformers as well as congratulate members for their contributions. If the goal is to create a community where competition pushes each member to perform, individual highlights may serve your needs, but if you want a group to solve a problem or address a challenge as a group, you have to promote group cohesion. Members need to feel a sense of belonging, and praise (or the lack thereof) can be a sword with two edges: one stimulates and motivates while the other demoralizes and divides.

Groups should be designed to produce and perform in ways and at levels that individuals cannot, or else you should consider compartmentalizing the tasks. The performing stage is where the productivity occurs, and it is necessary to make sure the group has what it needs to perform. Missing pieces, parts, or information can stall the group, and reset the cycle to storming all over again. Loss of performance is inefficiency, which carries a cost. Managers will be measured by the group's productivity and performance. Make sure the performing stage is one that is productive and healthy for its members.

Imagine that you are the manager of a group that has produced an award-winning design for an ecologically innovative four-seat car. Their success is your success. Their celebrations are yours even if the success is not focused on you. A manager manages the process while group members perform. If you were a member of the group that helped design the belt line, you made a fundamental contribution to the style of the car. Individual consumers may never consider the line from the front fender, across the doors, to the rear taillight as they make a purchase decision, but they will recognize beauty. You will know that you could not have achieved that fundamental part of car design without help from the engineers in the group, and if the number-crunching accountants had not seen the efficiency of the production process that produced it, it may never have survived the transition from prototype to production. The group came together and accomplished its goals with amazing results.

Now, as typically happens, all groups will eventually have to move on to new assignments. In the adjourning stage, members leave the group. The group may cease to exist or it may be transformed with new members and a new set of goals. Your contributions in the past may have caught the attention of the management, and you may be assigned to redesign the flagship vehicle, the halo car of your marque or brand. It's quite a professional honor, and it's yours because of your successful work in a group. Others will be reassigned to tasks that require their talents and skills, and you may or may not collaborate with them in the future.

You may miss the interactions with the members, even the more cantankerous ones, and will experience both relief and a sense of loss. Like life, the group process is normal, and mixed emotions are to be expected. A wise manager anticipates this stage and facilitates the separation with skill and ease. We often close this process with a ritual marking its passing, though the ritual may be as formal as an award or as informal as a "thank you" or a verbal acknowledgement of a job well done over coffee and calories.

On a more sober note, it is important not to forget that groups can reach the adjourning stage without having achieved success. Some businesses go bankrupt, some departments are closed, and some individuals lose their positions after a group fails to perform. Adjournment can come suddenly and unexpectedly, or gradually and piece by piece. Either way, a skilled business communicator will be prepared and recognize it as part of the classic group life cycle.

Life Cycle of Member Roles

Just as groups go through a life cycle when they form and eventually adjourn, so the group members fulfill different roles during this life cycle. These roles, proposed by Richard Moreland and John Levine, are summarized in Table $1.3.2.2$

Table $1.3.2.2$: Life Cycle of Member Roles

1. Potential Member	Curiosity and interest
2. New Member	Joined the group but still an outsider, and unknown
3. Full Member	Knows the "rules" and is looked to for leadership
4. Divergent Member	Focuses on differences
5. Marginal member	No longer involved
6. Ex-Member	No longer considered a member

Suppose you are about to graduate from school and you are in the midst of an employment search. You've gathered extensive information on a couple of local businesses and are aware that they will be participating in the university job fair. You've explored their Web sites, talked to people currently employed at each company, and learned what you can from the public information available. At this stage, you are considered a potential member. You may have an electrical, chemical, or mechanical engineering degree soon, but you are not a member of an engineering team.

You show up at the job fair in professional attire and completely prepared. The representatives of each company are respectful, cordial, and give you contact information. One of them even calls a member of the organization on the spot and arranges an interview for you next week. You are excited at the prospect and want to learn more. You are still a potential member.

The interview goes well the following week. The day after the meeting, you receive a call for a follow-up interview that leads to a committee interview. A few weeks later, the company calls you with a job offer. However, in the meantime, you have also been interviewing with other potential employers, and you are waiting to hear back from two of them. You are still a potential member.

After careful consideration, you decide to take the job offer and start the next week. The projects look interesting, you'll be gaining valuable experience, and the commute to work is reasonable. Your first day on the job is positive, and they've assigned you a mentor. The conversations are positive, but you feel lost at times, as if they are speaking a language you can't quite grasp. As a new group member, your level of acceptance will increase as you begin learning the groups' rules, spoken and unspoken (Fisher, B. A., 1970). You will gradually move from the potential member role to the role of new group member as you learn to fit into the group.

Figure 1.3.2.1: As a member of a new group, you will learn new customs and traditions. Wikimedia Commons – public domain.

Over time and projects, you gradually increase your responsibilities. You are no longer looked at as the new person, and you can follow almost every conversation. You can't quite say, "I remember when" because your tenure hasn't been that long, but you are a known quantity and know your way around. You are a full member of the group. Full members enjoy knowing the rules and customs, and can even create new rules. New group members look to full members for leadership and guidance. Full group members can control the agenda and have considerable influence on the agenda and activities.

Full members of a group, however, can and do come into conflict. When you were a new member, you may have remained silent when you felt you had something to say, but now you state your case. There is more than one way to get the job done. You may suggest new ways that emphasize efficiency over existing methods. Coworkers who have been working in the department for several years may be unwilling to adapt and change, resulting in tension. Expressing different views can cause conflict and may even interfere with communication.

When this type of tension arises, divergent group members pull back, contribute less, and start to see themselves as separate from the group. Divergent group members have less eye contact, seek out each other's opinion less frequently, and listen defensively. In the beginning of the process, you felt a sense of belonging, but now you don't. Marginal group members start to look outside the group for their interpersonal needs.

After several months of trying to cope with these adjustments, you decide that you never really investigated the other two companies; that your job search process was incomplete. Perhaps you should take a second look at the options. You will report to work on Monday, but will start the process of becoming an ex-member, one who no longer belongs. You may experience a sense of relief upon making this decision, given that you haven't felt like you belonged to the group for awhile. When you line up your next job and submit your resignation, you make it official.

This process has no set timetable. Some people overcome differences and stay in the group for years; others get promoted and leave the group only when they get transferred to regional headquarters. As a skilled business communicator, you will recognize the signs of divergence, just as you have anticipated the storming stage, and do your best to facilitate success.

Positive and Negative Member Roles

If someone in your group always makes everyone laugh, that can be a distinct asset when the news is less than positive. At times when you have to get work done, however, the class clown may become a distraction. Notions of positive and negative will often depend on the context when discussing groups. Table 1.3.2.3(Beene, K. and Sheats, P., 1948; McLean, S., 2005) and Table 1.3.2.4 (Beene, K. and Sheats, P., 1948; McLean, s., 2005) list both positive and negative roles people sometimes play in a group setting (Beene, K. and Sheats, P., 1948; McLean, S., 2005).

Table 1.3.2.3: Positive Roles

Initiator-Coordinator	Suggests new ideas or new ways of looking at the problem
Elaborator	Builds on ideas and provides examples
Coordinator	Brings ideas, information, and suggestions together
Evaluator-Critic	Evaluates ideas and provides constructive criticism
Recorder	Records ideas, examples, suggestions, and critiques

Table 1.3.2.4: Negative Roles

Dominator	Dominates discussion, not allowing others to take their turn
Recognition Seeker	Relates discussion to their accomplishments; seeks attention
Special-Interest Pleader	Relates discussion to special interest or personal agenda
Blocker	Blocks attempts at consensus consistently
Joker or Clown	Seeks attention through humor and distracts group members

Now that we've examined a classical view of positive and negative group member roles, let's examine another perspective. While some personality traits and behaviors may negatively influence groups, some are positive or negative depending on the context.

Just as the class clown can have a positive effect in lifting spirits or a negative effect in distracting members, a dominator may be exactly what is needed for quick action. An emergency physician doesn't have time to ask all the group members in the emergency unit how they feel about a course of action; instead, a self-directed approach based on training and experience may be necessary. In contrast, the pastor of a church may have ample opportunity to ask members of the congregation their opinions about a change in the format of Sunday services; in this situation, the role of coordinator or elaborator is more appropriate than that of dominator.

The group is together because they have a purpose or goal, and normally they are capable of more than any one individual member could be on their own, so it would be inefficient to hinder that progress. But a blocker, who cuts off collaboration, does just that. If a group member interrupts another and presents a viewpoint or information that suggests a different course of action, the point may be well taken and serve the collaborative process. But if that same group member repeatedly engages in blocking behavior, then the behavior becomes a problem. A skilled business communicator will learn to recognize the difference, even when positive and negative aren't completely clear.

Key Takeaway

Groups and their individual members come together and grow apart in predictable patterns.

Exercises

1. Is it possible for an outsider (a nongroup member) to help a group move from the storming stage to the norming stage? Explain your answer and present it to the class.
2. Think of a group of which you are a member and identify some roles played by group members, including yourself. Have your roles, and those of others, changed over time? Are some roles more positive than others? Discuss your answers with your classmates.
3. In the course where you are using this book, think of yourself and your classmates as a group. At what stage of group formation are you currently? What stage will you be at when the school year ends?
4. Think of a group you no longer belong to. At what point did you become an ex-member? Were you ever a marginal group member or a full member? Write a two- to three-paragraph description of the group, how and why you became a member, and how and why you left. Share your description with a classmate.

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1.3.3: Group Problem Solving

Learning Objectives

1. Identify and describe how to implement seven steps for group problem solving.

No matter who you are or where you live, problems are an inevitable part of life. This is true for groups as well as for individuals. Some groups—especially work teams—are formed specifically to solve problems. Other groups encounter problems for a wide variety of reasons. Within a family group, a problem might be that a daughter or son wants to get married and the parents do not approve of the marriage partner. In a work group, a problem might be that some workers are putting in more effort than others, yet achieving poorer results. Regardless of the problem, having the resources of a group can be an advantage, as different people can contribute different ideas for how to reach a satisfactory solution.

Once a group encounters a problem, the questions that come up range from "Where do we start?" to "How do we solve it?" While there are many ways to approach a problem, the American educational philosopher John Dewey's reflective thinking sequence has stood the test of time. This seven-step process (Adler, R., 1996) has produced positive results and serves as a handy organizational structure. If you are member of a group that needs to solve a problem and don't know where to start, consider these seven simple steps:

1. Define the problem
2. Analyze the problem
3. Establish criteria
4. Consider possible solutions
5. Decide on a solution
6. Implement the solution
7. Follow up on the solution

Let's discuss each step in detail.

Define the Problem

If you don't know what the problem is, how do you know you can solve it? Defining the problem allows the group to set boundaries of what the problem is and what it is not and to begin to formalize a description or definition of the scope, size, or extent of the challenge the group will address. A problem that is too broadly defined can overwhelm the group. If the problem is too narrowly defined, important information will be missed or ignored.

In the following example, we have a Web-based company called Favorites that needs to increase its customer base and ultimately sales. A problem-solving group has been formed, and they start by formulating a working definition of the problem.

Too broad: "Sales are off, our numbers are down, and we need more customers."

More precise: "Sales have been slipping incrementally for six of the past nine months and are significantly lower than a seasonally adjusted comparison to last year. Overall, this loss represents a 4.5 percent reduction in sales from the same time last year. However, when we break it down by product category, sales of our nonedible products have seen a modest but steady increase, while sales of edibles account for the drop off and we need to halt the decline."

Analyze the Problem

Now the group analyzes the problem, trying to gather information and learn more. The problem is complex and requires more than one area of expertise. Why do nonedible products continue selling well? What is it about the edibles that is turning customers off? Let's meet our problem solvers at Favorites.

Kevin is responsible for customer resource management. He is involved with the customer from the point of initial contact through purchase and delivery. Most of the interface is automated in the form of an online "basket model," where photographs and product descriptions are accompanied by "buy it" buttons. He is available during normal working business hours for live chat and voice chat if needed, and customers are invited to request additional information. Most Favorites customers do not access this service, but Kevin is kept quite busy, as he also handles returns and complaints. Because Kevin believes that superior service retains customers while attracting new ones, he is always interested in better ways to serve the customer. Looking at edibles and nonedibles, he will study the cycle of customer service and see if there are any common points—from the main Web page, through the catalog, to the purchase process, and to returns—at which customers abandon the sale. He has existing customer feedback loops with end-of-sale surveys, but most customers decline to take the survey and there is currently no incentive to participate.

Mariah is responsible for products and purchasing. She wants to offer the best products at the lowest price, and to offer new products that are unusual, rare, or exotic. She regularly adds new products to the Favorites catalog and culls underperformers. Right now she has the data on every product and its sales history, but it is a challenge to represent it. She will analyze current sales data and produce a report that specifically identifies how each product—edible and nonedible—is performing. She wants to highlight "winners" and "losers" but also recognizes that today's "losers" may be the hit of tomorrow. It is hard to predict constantly changing tastes and preferences, but that is part of her job. It's not all science, and it's not all art. She has to have an eye for what will catch on tomorrow while continuing to provide what is hot today.

Suri is responsible for data management at Favorites. She gathers, analyzes, and presents information gathered from the supply chain, sales, and marketing. She works with vendors to make sure products are available when needed, makes sales predictions based on past sales history, and assesses the effectiveness of marketing campaigns.

The problem-solving group members already have certain information on hand. They know that customer retention is one contributing factor. Attracting new customers is a constant goal, but they are aware of the well-known principle that it takes more effort to attract new customers than to keep existing ones. Thus, it is important to insure a quality customer service experience for existing customers and encourage them to refer friends. The group needs to determine how to promote this favorable customer behavior.

Another contributing factor seems to be that customers often abandon the shopping cart before completing a purchase, especially when purchasing edibles. The group members need to learn more about why this is happening.

Establish Criteria

Establishing the criteria for a solution is the next step. At this point, information is coming in from diverse perspectives, and each group member has contributed information from their perspective, even though there may be several points of overlap.

Kevin: Customers who complete the postsale survey indicate that they want to know (1) what is the estimated time of delivery, (2) why a specific item was not in stock and when it will be available, and (3) why their order sometimes arrives with less than a complete order, with some items back-ordered, without prior notification.

He notes that a very small percentage of customers complete the postsale survey, and the results are far from scientific. He also notes that it appears the interface is not capable of cross-checking inventory to provide immediate information concerning back orders, so that the customer "buys it" only to learn several days later that it was not in stock. This seems to be especially problematic for edible products, because people may tend to order them for special occasions like birthdays and anniversaries. But we don't really know this for sure because of the low participation in the postsale survey.

Mariah: There are four edible products that frequently sell out. So far, we haven't been able to boost the appeal of other edibles so that people would order them as a second choice when these sales leaders aren't available. We also have several rare, exotic products that are slow movers. They have potential, but currently are underperformers.

Suri: We know from a zip code analysis that most of our customers are from a few specific geographic areas associated with above-average incomes. We have very few credit cards declined, and the average sale is over $100. Shipping costs represent on average 8 percent of the total sales cost. We do not have sufficient information to produce a customer profile. There is no specific point in the purchase process where basket abandonment tends to happen; it happens fairly uniformly at all steps.

Consider Possible Solutions to the Problem

The group has listened to each other and now starts to brainstorm ways to address the challenges they have addressed while focusing resources on those solutions that are more likely to produce results.

Kevin: Is it possible for our programmers to create a cross-index feature, linking the product desired with a report of how many are in stock? I'd like the customer to know right away whether it is in stock, or how long they may have to wait. As another idea, is it possible to add incentives to the purchase cycle that won't negatively impact our overall profit? I'm thinking a small volume discount on multiple items, or perhaps free shipping over a specific dollar amount.

Mariah: I recommend we hold a focus group where customers can sample our edible products and tell us what they like best and why. When the best sellers are sold out, could we offer a discount on related products to provide an instant alternative? We might also cull the underperforming products with a liquidation sale to generate interest.

Suri: If we want to know more about our customers, we need to give them an incentive to complete the postsale survey. How about a 5 percent off coupon code for the next purchase to get them to return and to help us better identify our customer base? We may also want to build in a customer referral rewards program, but it all takes better data in to get results out. We should also explore the supply side of the business by getting a more reliable supply of the leading products and trying to get discounts that are more advantageous from our suppliers, especially in the edible category.

Decide on a Solution

Kevin, Mariah, and Suri may want to implement all the solution strategies, but they do not have the resources to do them all. They'll complete a cost-benefit analysis, which ranks each solution according to its probable impact. The analysis is shown in Table 1.3.3.1.

Table 1.3.3.1: Cost-Benefit Analysis

Source	Proposed Solution	Cost	Benefit	Comment
Kevin	Integrate the cross-index feature	High	High	Many of our competitors already have this feature
	Volume discount	Low	Medium	May increase sales slightly
	Free shipping	Low	Low	This has a downside in making customers more aware of shipping costs if their order doesn't qualify for free shipping
Mariah	Hold a focus group to taste edible products	High	Medium	Difficult to select participants representative of our customer base
	Search for alternative products to high performers	Medium	Medium	We can't know for sure which products customers will like best
	Liquidate underperformers	Low	Low	Might create a "bargain basement" impression inconsistent with our brand
Suri	Incentive for postsale survey completion	Low	Medium	Make sure the incentive process is easy for the customer
	Incentive for customer referrals	Low	Medium	People may feel uncomfortable referring friends if it is seen as putting them in a marketing role
	Find a more reliable supply of top-selling edibles	Medium	High	We already know customers want these products
	Negotiate better discounts from vendors	Low	High	If we can do this without alienating our best vendors, it will be a win-win

Now that the options have been presented with their costs and benefits, it is easier for the group to decide which courses of action are likely to yield the best outcomes. The analysis helps the group members to see beyond the immediate cost of implementing a given solution. For example, Kevin's suggestion of offering free shipping won't cost Favorites much money, but it also may not pay off in customer goodwill. And even though Mariah's suggestion of having a focus group might sound like a good idea, it will be expensive and its benefits are questionable.

A careful reading of the analysis indicates that Kevin's best suggestion is to integrate the cross-index feature in the ordering process so that customers can know immediately whether an item is in stock or on back order. Mariah, meanwhile, suggests that searching for alternative products is probably the most likely to benefit Favorites, while Suri's two supply-side suggestions are likely to result in positive outcomes.

Implement the Solution

Kevin is faced with the challenge of designing the computer interface without incurring unacceptable costs. He strongly believes that the interface will pay for itself within the first year—or, to put it more bluntly, that Favorites' declining sales will get worse if the Web site does not have this feature soon. He asks to meet with top management to get budget approval and secures their agreement, on one condition: he must negotiate a compensation schedule with the Information Technology consultants that includes delayed compensation in the form of bonuses after the feature has been up and running successfully for six months.

Mariah knows that searching for alternative products is a never-ending process, but it takes time and the company needs results. She decides to invest time evaluating products that competing companies currently offer, especially in the edible category, on the theory that customers who find their desired items sold out on the Favorites Web site may have been buying alternative products elsewhere instead of choosing an alternative from Favorites's product lines.

Suri decides to approach the vendors of the four frequently sold-out products and ask point blank, "What would it take to get you to produce these items more reliably in greater quantities?" By opening the channel of communication with these vendors, she is able to motivate them to make modifications that will improve the reliability and quantity. She also approaches the vendors of the less popular products with a request for better discounts in return for their cooperation in developing and test-marketing new products.

Follow Up on the Solution

Kevin: After several beta tests, the cross-index feature was implemented and has been in place for thirty days. Now customers see either "in stock" or "available [mo/da/yr]" in the shopping basket. As expected, Kevin notes a decrease in the number of chat and phone inquiries to the effect of, "Will this item arrive before my wife's birthday?" However, he notes an increase in inquiries asking, "Why isn't this item in stock?" It is difficult to tell whether customer satisfaction is higher overall.

Mariah: In exploring the merchandise available from competing merchants, she got several ideas for modifying Favorites' product line to offer more flavors and other variations on popular edibles. Working with vendors, she found that these modifications cost very little. Within the first thirty days of adding these items to the product line, sales are up. Mariah believes these additions also serve to enhance the Favorites brand identity, but she has no data to back this up.

Suri: So far, the vendors supplying the four top-selling edibles have fulfilled their promise of increasing quantity and reliability. However, three of the four items have still sold out, raising the question of whether Favorites needs to bring in one or more additional vendors to produce these items. Of the vendors with which Favorites asked to negotiate better discounts, some refused, and two of these were "stolen" by a competing merchant so that they no longer sell to Favorites. In addition, one of the vendors that agreed to give a better discount was unexpectedly forced to cease operations for several weeks because of a fire.

This scenario allows us to see that the problem may have several dimensions as well as solutions, but resources can be limited and not every solution is successful. Even though the problem is not immediately resolved, the group problem-solving pattern serves as a useful guide through the problem-solving process.

Key Takeaway

Group problem solving can be an orderly process when it is broken down into seven specific stages.

Exercises

1. Think of a problem encountered in the past by a group of which you are a member. How did the group solve the problem? How satisfactory was the solution? Discuss your results with your classmates.
2. Consider again the problem you described in Exercise 1. In view of the seven-step framework, which steps did the group utilize? Would following the full seven-step framework have been helpful? Discuss your opinion with a classmate.
3. Research one business that you would like to know more about and see if you can learn about how they communicate in groups and teams. Compare your results with those of classmates.

4. Think of a decision you will be making some time in the near future. Apply the cost-benefit analysis framework to your decision. Do you find this method helpful? Discuss your results with classmates.

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1.3.4: Business and Professional Meetings

Learning Objectives

1. Understand how to prepare for and conduct business meetings.
2. Understand how to use technology to aid in group communications.
3. Understand the basic principles of organizational communication.

Business and professional meetings are a part of the communication climate of any business. Some view meetings as boring, pointless, and futile exercises, while others see them as opportunities to exchange information and produce results. A combination of preparation and execution makes all the difference. Remember, too, that meetings do not have to take place in a physical space where the participants meet face to face. Instead, a number of technological tools make it possible to hold virtual meetings in which the participants are half a world away from one another. Virtual meetings are formally arranged gatherings where participants, located in distinct geographic locations, come together via the Internet.

Preparation

A meeting, like a problem-solving group, needs a clear purpose statement. The specific goal for the specific meeting will clearly relate to the overall goal of the group or committee. Determining your purpose is central to an effective meeting and getting together just to get together is called a party, not a meeting. Do not schedule a meeting just because you met at the same time last month or because it is a standing committee. Members will resent the intrusion into their schedules and quickly perceive the lack of purpose.

Similarly, if the need for a meeting arises, do not rush into it without planning. A poorly planned meeting announced at the last minute is sure to be less than effective. People may be unable to change their schedules, may fail to attend, or may impede the progress and discussion of the group because of their absence. Those who attend may feel hindered because they needed more time to prepare and present comprehensive results to the group or committee.

If a meeting is necessary, and a clear purpose can be articulated, then you'll need to decide how and where to meet. Distance is no longer an obstacle to participation, as we will see later in this section when we explore some of the technologies for virtual meetings. However, there are many advantages to meeting in person. People communicate not just with words but also with their body language—facial expressions, hand gestures, head nodding or head shaking, and posture. These subtleties of communication can be key to determining how group members really feel about an issue or question. Meeting in real time can be important, too, as all group members have the benefit of receiving new information at the same time. For purposes of our present discussion, we will focus on meetings taking place face to face in real time.

If you have a purpose statement for the meeting, then it also follows that you should be able to create an agenda, or a list of topics to be discussed. You may need to solicit information from members to formulate an agenda, and this premeeting contact can serve to encourage active participation. The agenda will have a time, date, place, and method of interaction noted, as well as a list of participants. It will also have a statement of purpose, a list of points to be considered, and a brief summary of relevant information that relates to each point. Somewhere on the agenda the start and end times need to be clearly indicated, and it is always a good idea to leave time at the end for questions and additional points that individual members may want to share. If the meeting has an emotional point or theme, or the news is negative, plan for additional time for discussion, clarification, and recycling of conversations as the participants process the information.

If you are planning an intense work session, you need to consider the number of possible interactions among the participants and limit them. Smaller groups are generally more productive. If you are gathering to present information or to motivate the sales staff, a large audience, where little interaction is expected, is appropriate. Each member has a role, and attention to how and why they are interacting will produce the best results. Review the stages of group formation in view of the idea that a meeting is a short-term group. You can anticipate a "forming" stage, and if roles are not clear, there may be a bit of "storming" before the group establishes norms and becomes productive. Adding additional participants for no clear reason will only make the process more complex and may produce negative results.

Inviting the participants via e-mail has become increasingly common across business and industry. Software programs like Microsoft Outlook allow you to initiate a meeting request and receive an "accept" or "decline" response that makes the invitation process organized and straightforward. Reliance on a software program, however, may not be enough to encourage and ensure participation. A reminder on the individual's computer may go off fifteen minutes prior to the meeting, but if they are away from their computer or if Outlook is not running, the reminder will go unseen and unheard. A reminder e-mail on the day of the meeting, often early in the morning, can serve as a personal effort to highlight the activities of the day.

If you are the person responsible for the room reservation, confirm the reservation a week before the meeting and again the day before the meeting. Redundancy in the confirmation process can help eliminate double-booking a room, where two meetings are scheduled at the same time. If technology is required at the meeting, such as a microphone, conference telephone, or laptop and projector, make sure you confirm their reservation at the same time as you confirm the meeting room reservation. Always personally inspect the room and test these systems prior to the meeting. There is nothing more embarrassing than introducing a high-profile speaker, such as the company president, and then finding that the PowerPoint projector is not working properly.

Conducting the Meeting

The world is a stage and a meeting is a performance, the same as an interview or speech presentation. Each member has a part to perform and they should each be aware of their roles and responsibilities prior to the meeting. Everyone is a member of the group, ranging from new members to full members. If you can reduce or eliminate the storming stage, all the better. A clearly defined agenda can be a productive tool for this effort.

People may know each other by role or title, but may not be familiar with each other. Brief introductions can serve to establish identity, credibility, and help the group transition to performance. The purpose of the meeting should be clearly stated, and if there are rules or guidelines that require a specific protocol, they should be introduced.

Mary Ellen Guffey provides a useful participant checklist that is adapted here for our use:

- Arrive on time and stay until the meeting adjourns (unless there are prior arrangements)
- Leave the meeting only for established breaks or emergencies
- Be prepared and have everything you need on hand
- Turn off cell phones and personal digital assistants
- Follow the established protocol for turn taking
- Respect time limits
- Demonstrate professionalism in your verbal and nonverbal interactions
- Communicate interest and stay engaged in the discussion
- Avoid tangents and side discussions
- Respect space and don't place your notebook or papers all around you
- Clean up after yourself
- Engage in polite conversation after the conclusion

If you are cast in the role of meeting leader, you may need to facilitate the discussion and address conflict. The agenda serves as your guide and you may need to redirect the discussion to the topic, but always demonstrate respect for each and every member. You may also need to intervene if a point has reached a stalemate in terms of conflict (this text offers specific guidelines for managing interpersonal conflict that apply here).

There has been quite a discussion on the role of seating arrangements in meeting within the field of business communication. Generally, a table that is square, rectangular, or U-shaped has a fixed point at which the attention is directed, often referred to as the head of the table. This space is often associated with power, status, and hierarchy and may play an important role in the flow of interactions across the meeting. If information is to be distributed and presented from administration to managers, for example, a table with a clear focal point for the head or CEO may be indicated. Tables that are round, or tables arranged in a circular pattern, allow for a more egalitarian model of interaction, reducing the hierarchical aspects while reinforcing the clear line of sight among all participants. If a meeting requires intense interaction and collaboration, generally a round table or a circular pattern is indicated.

Some meetings do not call for a table, but rather rows of seats all facing toward the speaker; you probably recognize this arrangement from many class lectures you have attended. For relatively formal meetings in which information is being delivered to a large number of listeners and little interaction is desired, seating in rows is an efficient use of space.

Transitions are often the hardest part of any meeting. Facilitating the transition from one topic to the next may require you to create links between each point. You can specifically note the next point on the agenda and verbally introduce the next speaker or person responsible for the content area. Once the meeting has accomplished its goals in the established time frame, it is time to facilitate the transition to a conclusion. You may conclude by summarizing what has been discussed or decided, and what actions the group members are to take as a result of the meeting. If there is a clear purpose for holding a subsequent meeting, discuss the time and date, and specifically note assignments for next time.

Feedback is an important part of any communication interaction. Minutes are a written document that serves to record the interaction and can provide an opportunity for clarification. Minutes often appear as the agenda with notes in relation to actions taken during the meeting or specific indications of who is responsible for what before the next meeting. In many organizations, minutes of the meeting are tentative, like a rough draft, until they are approved by the members of the group or committee. Normally minutes are sent within a week of the meeting if it is a monthly event, and more quickly if the need to meet more frequently has been determined. If your organization does not call for minutes, you can still benefit by reviewing your notes after a meeting and comparing them with those of others to make sure you understood what was discussed and did not miss—or misinterpret—any key information.

Using Technology to Facilitate Meetings

Given the widespread availability and increasingly low cost of electronic communication, technologies that once served to bring people together across continents and time zones are now also serving people in the same geographic area. Rather than traveling (by plane, car, or even elevator within the same building) to a central point for a face-to-face interaction, busy and cost-conscious professionals often choose to see and hear each other via one of many different electronic interface technologies. It is important to be aware of the dimensions of nonverbal communication that are lost in a virtual meeting compared to an in-person meeting. Nevertheless, these technologies are a boon to today's business organizations, and knowing how to use them is a key skill for all job seekers. We will discuss the technologies by category, beginning with audio-only, then audio-visual, and finally social media.

Audio-Only Interactions

The simplest form of audio-only interaction is, of course, a telephone call. Chances are that you have been using the phone all your life, yet did you know that some executives hire professional voice coaches to help them increase their effectiveness in phone communication? When you stop to think about it, we use a great many audio-only modes of communication, ranging from phone calls and voice-activated telephone menus to radio interviews, public address systems, dictation recording systems, and computer voice recognition technology. The importance of audio communication in the business world has increased with the availability of conference calls, Web conferences, and voice over Internet protocol (VoIP) communications.

Your voice has qualities that cannot be communicated in written form, and you can use these qualities to your advantage as you interact with colleagues. If you are sending a general informative message to all employees, an e-mail may serve you well, but if you are congratulating one employee on receiving an industry award, your voice as the channel carries your enthusiasm.

Take care to pay attention to your pronunciation of words, stating them correctly in normal ways, and avoiding words that you are not comfortable with as you may mispronounce them. Mispronunciation can have a negative impact on your reputation or perceived credibility. Instead of using complicated words that may cause you to stumble, choose a simple phrase if you can, or learn to pronounce the word correctly before you use it in a formal interactive setting.

Your voice quality, volume, and pitch also influence how your spoken words are interpreted. Quality often refers to emotional tone of your voice, from happy and enthusiastic to serious or even sad. In most business situations, it is appropriate to speak with some level of formality, yet avoid sounding stilted or arrogant. Your volume (the loudness of your voice) should be normal, but do make sure your listeners can hear you. In some situations, you may be using a directional microphone that only amplifies your voice signal if you speak directly into it.

If your audience includes English learners, remember that speaking louder (i.e., shouting) does not help them to understand you any better than speaking in a normal tone. Your word choices will make a much more significant impact when communicating across cultures; strive to use direct sentences and avoid figures of speech that do not translate literally.

Pitch refers to the frequency, high or low, of your voice. A pleasant, natural voice will have some variation in pitch. A speaker with a flat pitch, or a monotone (one-tone) voice, is often interpreted as being bored and often bores his or her listeners.

If you are leaving a voice mail, state all the relevant information in concise, clear terms, making sure to speak slowly; don't forget to include your contact information, even if you think the person already knows your phone number. Imagine you were writing down your phone number as you recite it and you will be better able to record it at a "listener-friendly" speed. Don't leave a long, rambling voice mail message. You may later wish you had said less, and the more content you provide the more you increase the possibility for misunderstandings without your being present for clarification.

Audio-Visual Interactions

Rather than call each other, we often call and interact in both audio and visual ways via the Internet. There are several ways to interface via audio and video, and new technologies in this area are being invented all the time. For example, VoIP software allows the participants to see and hear each other across time and distance with one-on-one calls and video conferencing. The audio portion of the call comes through a headset, and the callers see each other on their computer monitors, as if they were being broadcast on television. This form of audio-visual communication is quickly becoming a low- or no-cost business tool for interaction.

If you are going to interact via audio and visual signals, make sure you are prepared. Appropriate dress, setting, and attitude are all required. The integration of a visual signal to the traditional phone call means that nonverbal gestures can now be observed in real time and can both aid and detract from the message.

If you are unfamiliar with the technology, practice with it before your actual business interaction. Try out the features with a friend and know where to find and access the information. If the call doesn't go as planned, or the signal isn't what you expected or experienced in the past, keep a good attitude and try again.

Social Media

Online communities, forums, blogs, tweets, cloud computing, and avatar-activated environments are some of the continually developing means of social media being harnessed by the business world. The Internet is increasingly promoting tools and platforms for people to interact. From bulletin boards that resemble the FreeNet posts of years past, to interactive environments like Second Life, people are increasingly representing and interpreting themselves online.

Humans seek interaction, and this has led to new ways to market, advertise, and interact; however, caution is warranted when engaging in social media online. When you use these media, remember a few simple cautions:

1. Not everything is at it appears. The individuals on the forum may not all be who they represent themselves to be.
2. The words you write and the images you send, regardless of how much you trust the recipient, may become public and can remain online forever.
3. Always consider what you access and what you post, and how it represents you and your employer, even if you think others cannot know where you work or who you are.
4. Be aware that Internet service providers (ISPs) are required by law to archive information concerning the use and traffic of information that can become available under subpoena.

Forums are often theme-based Web sites that gather a community of individuals dedicated to a common interest. From owner-enthusiast Web sites that celebrate the new Mini Cooper, where owners discuss modifications and sell parts to each other, to forums that emphasize a viewpoint, such as the Life After the Oil Crash (LATOC) discussion board, affectionately called doomers, people come together to compare notes around areas of interest.

Professional networking sites such as LinkedIn allow people to link to, and interact with, others who work in their industry or related ones. More general social media sites include MySpace and Facebook, which also present threaded discussions and dynamic interfaces with groups that may or may not be limited to those that user intends. Interactive writing platforms such as blogs, wikis, and cloud computing involve having common documents stored on the Internet which can be accessed from multiple sites at once, further facilitating the interaction. Blogs are Web pages with periodic posts that may or may not feature feedback responses from readers. Wikis are collaborations on Web content that are created and edited by users. Cloud computing involves secure access of files from anywhere as information is stored remotely. Somewhere between a social networking site, where people gather virtually to interact, and a computer game lies the genre of avatar-activated virtual worlds such as Second Life. In these environments, users can meet others and make friends, participate in activities, and create and trade virtual property and services.

Business and industry organizations may also incorporate posts and threaded discussions, but often under a password-protected design on a company's intranet or other limited-access platform. Employees may use their business-provided computer equipment to access sites that are not business related (if not specifically blocked), but all information associated with a each business's computer is subject to inspection, archival, and supervision.

Every computer is assigned an Internet protocol or IP address. The IP address can be specifically traced back to the original user, or at least to the computer itself and to who is responsible for its use. From an e-mail via one of the free sites (e.g., Juno, Google's Gmail, or Yahoo! Mail) to cloud computing and wikis, your movements across the Web leave clear "footprints."

Whether you maintain a personal Web page, a blog, or engage with peers and colleagues via Twitter, take care when considering what personal information to make public. Privacy is an increasing issue online and your safety is a priority. Always represent yourself and your organization with professionalism, knowing that what you search for and how you use your business computer can and often is subject to inspection.

Organizational Communication

Businesses and companies are often described in terms we normally associate with family, from relationships between siblings, to dominant-subordinate roles between parents and children, and the role of praise and correction. Organizational communication, or the study of the communication context, environment, and interaction within an organization, was once the domain of speech communication departments. Modern business schools now view the study of organizational communication as an integral part of the curriculum, noting the interdependent relationships of productivity, climate, and interaction between individuals within the organization (internal) and related to the organization (external), such as suppliers or customers.

Organizations have communication needs and challenges just like a family, a group, or a community. We can examine the study of communication within an organization, noting common interactive practices like performance reviews, newsletters, supervisor and direction, and the flow of information throughout the organization. We can also study the practices of the organization as they relate to other organizations and the media, as is public relations, crisis communication plans, and interorganizational interaction. Research into these areas often emphasizes the outcome, in terms of increased productivity and more effective strategic communication systems (Tucker, M., Meyer, G., and Westman, J., 1986). Change management, knowledge management, organizational culture, leaderships, and strategic planning often include elements of organizational communication, and again examine communication from the perspective of efficiency and effectiveness.

As a skilled business writer or communicator, you can see that the study of organizational communication can serve to inform you on the lessons learned by other companies, which are often represented in research publications, to improve the processes in place within your organization. For example, crisis management once was a knee-jerk reaction to a situation, one that caused businesses and companies to experience chaos and information management in unanticipated ways, leading to mistakes and damaging reputations. Crisis communication plans are now a common feature in business, outlining roles and responsibilities, as well as central communication coordination and how to interact with media. Supervisors and employees then have a guide to serve everyone, much like a common playbook in organized sports like football, where everyone knows everyone else's position on the field once an emergency occurs.

Key Takeaway

Meetings require planning, choice of appropriate technology, and understanding of organizational communication.

Exercises

1. Take notes in one of your classes as if they were the official minutes of a meeting. Does the class "meeting" have a purpose? What preparations were made and what technology was used? Is there a follow-up or a plan for the next class meeting? Compare your notes with another student to see if you understood all the information conveyed in the class.
2. Collaborate with one or more classmates and contribute to a computing cloud or a wiki. What was the activity like? Did you learn new information that you would not have learned by studying individually?
3. Make an audio recording of your voice and listen to it. Are there aspects of your voice quality, pronunciation, or delivery style that you would like to improve? Practice daily and make more recordings until you notice improvement.

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1.3.5: Teamwork and Leadership

Learning Objectives

1. Define teamwork and explain how to overcome various challenges to group success.
2. Describe the process of leader development.
3. Describe several different leadership styles and their likely influence on followers.

Two important aspects of group communication—especially in the business environment—are teamwork and leadership. You will work in a team and at some point may be called on to lead. You may emerge to that role as the group recognizes your specific skill set in relation to the task, or you may be appointed to a position of responsibility for yourself and others. Your communication skills will be your foundation for success as a member and as a leader. Listen and seek to understand both the task and your group members as you become involved with the new effort. Have confidence in yourself and inspire the trust of others. Know that leading and following are both integral aspects of effective teamwork.

Teamwork

Teamwork is a compound word, combining team and work. Teams are a form of group normally dedicated to production or problem solving. That leaves us with the work. This is where our previous example on problem solving can serve us well. Each member of the team has skills, talents, experience, and education. Each is expected to contribute. Work is the activity, and while it may be fun or engaging, it also requires effort and commitment, as there is a schedule for production with individual and group responsibilities. Each member must fulfill his or her own obligations for the team to succeed, and the team, like a chain, is only as strong as its weakest member. In this context we don't measure strength or weakness at the gym, but in terms of productivity.

Teams can often achieve higher levels of performance than individuals because of the combined energies and talents of the members. Collaboration can produce motivation and creativity that may not be present in single-contractor projects. Individuals also have a sense of belonging to the group, and the range of views and diversity can energize the process, helping address creative blocks and stalemates. By involving members of the team in decision-making, and calling up on each member's area of contribution, teams can produce positive results.

Teamwork is not without its challenges. The work itself may prove a challenge as members juggle competing assignments and personal commitments. The work may also be compromised if team members are expected to conform and pressured to go along with a procedure, plan, or product that they themselves have not developed. Groupthink, or the tendency to accept the group's ideas and actions in spite of individual concerns, can also compromise the process and reduce efficiency. Personalities and competition can play a role in a team's failure to produce.

We can recognize that people want to belong to a successful team, and celebrating incremental gain can focus the attention on the project and its goals. Members will be more willing to express thoughts and opinions, and follow through with actions, when they perceive that they are an important part of the team. By failing to include all the team members, valuable insights may be lost in the rush to judgment or production. Making time for planning, and giving each member time to study, reflect, and contribute can allow them to gain valuable insights from each other, and may make them more likely to contribute information that challenges the status quo. Unconventional or "devil's advocate" thinking may prove insightful and serve to challenge the process in a positive way, improving the production of the team. Respect for divergent views can encourage open discussion.

John Thill and Courtland Bovee provide a valuable list to consider when setting up a team, which we have adapted here for our discussion:

- Select team members wisely
- Select a responsible leader
- Promote cooperation
- Clarify goals
- Elicit commitment
- Clarify responsibilities
- Instill prompt action
- Apply technology
- Ensure technological compatibility

- Provide prompt feedback

Group dynamics involve the interactions and processes of a team and influence the degree to which members feel a part of the goal and mission. A team with a strong identity can prove to be a powerful force, but it requires time and commitment. A team that exerts too much control over individual members can run the risk or reducing creative interactions and encourage tunnel vision. A team that exerts too little control, with attention to process and areas of specific responsibility, may not be productive. The balance between motivation and encouragement, and control and influence, is challenging as team members represent diverse viewpoints and approaches to the problem. A skilled business communicator creates a positive team by first selecting members based on their areas of skill and expertise, but attention to their style of communication is also warranted. Individuals that typically work alone or tend to be introverted may need additional encouragement to participate. Extroverts may need to be encouraged to listen to others and not dominate the conversation. Teamwork involves teams and work, and group dynamics play an integral role in their function and production.

Leadership

Whether or not there is a "natural leader," born with a combination of talents and traits that enable a person to lead others, has been a subject of debate across time. In a modern context, we have come to recognize that leadership comes in many form and representations. Once it was thought that someone with presence of mind, innate intelligence, and an engaging personality was destined for leadership, but modern research and experience shows us otherwise. Just as a successful heart surgeon has a series of skill sets, so does a dynamic leader. A television producer must both direct and provide space for talent to create, balancing control with confidence and trust. This awareness of various leadership styles serves our discussion as groups and teams often have leaders, and they may not always be the person who holds the title, status, or role.

Leaders take on the role because they are appointed, elected, or emerge into the role. The group members play an important role in this process. An appointed leader is designated by an authority to serve in that capacity, irrespective of the thoughts or wishes of the group. They may serve as the leader and accomplish all the designated tasks, but if the group does not accept their role as leader, it can prove to be a challenge. As Bruce Tuckman notes, "storming" occurs as group members come to know each other and communicate more freely, and an appointed leader who lacks the endorsement of the group may experience challenges to his or her authority.

A democratic leader is elected or chosen by the group, but may also face serious challenges. If individual group members or constituent groups feel neglected or ignored, they may assert that the democratic leader does not represent their interests. The democratic leader involves the group in the decision-making process, and insures group ownership of the resulting decisions and actions as a result. Open and free discussions are representative of this process, and the democratic leader acknowledges this diversity of opinion.

An emergent leader contrasts the first two paths to the role by growing into the role, often out of necessity. The appointed leader may know little about the topic or content, and group members will naturally look to the senior member with the most experience for leadership. If the democratic leader fails to bring the group together, or does not represent the whole group, subgroups may form, each with an informal leader serving as spokesperson.

Types of Leaders

We can see types of leaders in action and draw on common experience for examples. The heart surgeon does not involve everyone democratically, is typically appointed to the role through earned degrees and experience, and resembles a military sergeant more than a politician. The autocratic leader is self-directed and often establishes norms and conduct for the group. In some settings we can see that this is quite advantageous, such as open-heart surgery or during a military exercise, but it does not apply equally to all leadership opportunities.

Contrasting the autocrat is the laissez-faire, or "live and let live" leader. In a professional setting, such as a university, professors may bristle at the thought of an autocratic leader telling them what to do. They have earned their role through time, effort, and experience and know their job. A wise laissez-faire leader recognizes this aspect of working with professionals and may choose to focus efforts on providing the professors with the tools they need to make a positive impact. Imagine that you are in the role of a television director and you have a vision or idea of what the successful pilot program should look like. The script is set, the lighting correct, and the cameras are in the correct position. You may tell people what to do and where to stand, but you remember that your job is to facilitate the overall process. You work with talent, and creative people are interesting on camera. If you micromanage your actors, they may perform in ways that are not creative and that will not draw audiences. If you let them run wild through improvisation, the program may not go well at all. Balancing the need for control with the need for space is the challenge of the laissez-faire leader.

Not all leaders are autocrats or laissez-faire leaders. Thomas Harris and John Sherblom specifically note three leadership styles that characterize the modern business or organization, and reflect our modern economy. We are not born leaders but may become them if the context or environment requires our skill set. A leader-as-technician role often occurs when we have skills that others do not. If you can fix the copy machine at the office, your leadership and ability to get it running again are prized and sought-after skills. You may instruct others on how to load the paper or how to change the toner, and even though your pay grade may not reflect this leadership role, you are looked to by the group as a leader within that context. Technical skills, from Internet technology to facilities maintenance, may experience moments where their particular area of knowledge is required to solve a problem. Their leadership will be in demand.

The leader-as-conductor involves a central role of bringing people together for a common goal. In the common analogy, a conductor leads an orchestra and integrates the specialized skills and sounds of the various components the musical group comprises. In the same way, a leader who conducts may set a vision, create benchmarks, and collaborate with a group as they interpret a set script. Whether it is a beautiful movement in music or a group of teams that comes together to address a common challenge, the leader-as-conductor keeps the time and tempo of the group.

Coaches are often discussed in business-related books as models of leadership for good reason. A leader-as-coach combines many of the talents and skills we've discussed here, serving as a teacher, motivator, and keeper of the goals of the group. A coach may be autocratic at times, give pointed direction without input from the group, and stand on the sidelines while the players do what they've been trained to do and make the points. The coach may look out for the group and defend it against bad calls, and may motivate players with words of encouragement. We can recognize some of the behaviors of coaches, but what specific traits have a positive influence on the group? Thomas Peters and Nancy Austin identify five important traits that produce results:

1. Orientation and education
2. Nurturing and encouragement
3. Assessment and correction
4. Listening and counseling
5. Establishing group emphasis

Coaches are teachers, motivators, and keepers of the goals of the group. There are times when members of the team forget that there is no "I" in the word "team." At such times, coaches serve to redirect the attention and energy of the individuals to the overall goals of the group. They conduct the group with a sense of timing and tempo, and at times, they relax and let the members demonstrate their talents. Through their listening skills and counseling, they come to know each member as an individual, but keep the team focus for all to see. They set an example. Coaches, however, are human and by definition are not perfect. They can and do prefer some players over others and can display less than professional sideline behavior when they don't agree with the referee, but the style of leadership is worthy of your consideration in its multidisciplinary approach. Coaches use more than one style of leadership and adapt to the context and environment. A skilled business communicator will recognize that this approach has its merits

Key Takeaway

Teamwork allows individuals to share their talents and energy to accomplish goals. An effective leader facilitates this teamwork process.

Exercises

1. Do you prefer working in a group or team environment, or working individually? What are the advantages and disadvantages of each? Discuss your thoughts with classmates.
2. Imagine that you could choose anyone you wanted to be on a team with you. Who would you choose, and why? Write a two- to three-paragraph description and share it with a classmate.
3. Think of a leader you admire and respect. How did this individual become a leader—for example, by appointment, democratic selection, or emergence? How would you characterize this leader's style—is the leader autocratic or laissez-faire, a technician, or a coach?

References

Harris, T., & Sherblom, J. (1999). *Small group and team communication*. Boston, MA: Allyn & Bacon.

Peters, T., & Austin, N. (1985). *A passion for excellence: The leadership difference*. New York, NY: Random House.

Thill, J. V., & Bovee, C. L. (2002). *Essentials of business communication*. Upper Saddle River, NJ: Prentice Hall.

Tuckman, B. (1965). Developmental sequence in small groups. *Psychological Bulletin, 63*, 384–399.

1.3.6: Additional Resources

Read about groups and teams on the business Web site 1000 Ventures. http://www.1000ventures.com/business_guide/crosscuttings/team_main.html

Learn more about Tuckman's linear model. http://infed.org/mobi/bruce-w-tuckman-forming-storming-norming-and-performing-in-groups/

Learn more about Dewey's sequence of group problem solving on this site from the State College of Florida. faculty.scf.edu/frithl/SPC1608update/handouts/Dewey.htm

Read a hands-on article about how to conduct productive meetings. www.articlesnatch.com/Article/How-To-Conduct-Productive-Meetings-/132050

Visit this wikiHow site to learn how to use VoIP. http://www.wikihow.com/Use-VoIP

Watch a YouTube video on cloud computing. http://www.youtube.com/watch?v=6PNuQHUiV3Q

Read about groups and teams, and contribute to a wiki about them, on Wikibooks. http://en.wikibooks.org/wiki/Managing_Groups_and_Teams

How did Twitter get started? Find out. http://twitter.com/about

Take a (nonscientific) quiz to identify your leadership style. http://psychology.about.com/library/quiz/bl-leadershipquiz.htm

SECTION OVERVIEW

1.4: Communicating in Business

1.4.1: Guidelines for Ethical Communication

Learning Outcomes

- Identify key guidelines for ethical business 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

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

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.

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 posted an article called “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. Abrahms recently won a primary elections as a candidate for Georgia governor (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:[1]

- 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

https://assessments.lumenlearning.co...sessments/8496

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:

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=62

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1. International Association of Business Communicators, "IABC Code of Ethics for Professional Communicators." ↵

1.4.2: Being Ethical Online

Learning Outcomes

- Describe how to communicate ethically 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

https://assessments.lumenlearning.co...sessments/8497

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.

1.4.3: Introduction to 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.

1.4.4: Staying Connected

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

https://assessments.lumenlearning.co...sessments/8498

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

https://assessments.lumenlearning.co...sessments/8499

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.

1.4.5: 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!

1.4.6: Assignment- Communicating in Business

Part 1

Your task is to read the statements below and rate your perception of your communication skills.

- Download a PDF of this form here.
- Download a .docx file of this form here.

How often does this describe me during a conversation/communication?		Usually	Sometimes	Seldom
Writing Skills	I know the parts of a proper email, memo, and business letter formatting.			
	I know the basic parts of formal or informal reports.			
	I can evaluate a document to determine if it might be successful.			
Reading Skills	I am familiar with specialized vocabulary in my field of work.			
	I am willing to look up the meanings of words or concepts I don't fully understand.			
	I can get the basic meaning of words I am unfamiliar with by using context clues in the text			
	I am comfortable reading a text in a variety of mediums (paper, tablet, computer screen, etc)			
Listening Skills	I do not react to distractions (phone, etc).			
	I listen to half of the conversation without taking it over.			
	I can provide proper verbal and nonverbal feedback (nodding).			
	I can summarize the speaker's ideas by paraphrasing and asking questions.			
Speaking Skills	I find it easy and comfortable to talk with friends.			
	I find it easy and comfortable to talk with coworkers			
	I am confident when giving a presentation to different audiences			
	I am confident in pronouncing and using words correctly			

After rating your skills, write a short response to the following questions (max 500 words)

- What are your strongest and weakest skills?
- How do you think this class will help you improve or build upon your current communication skill set?

Part 2

Your task is to write an email to your instructor to introduce yourself. Put your first and last name and the assignment title in the subject line. For example: Maria Ruiz Assignment 1

Your message should address the following:

1. Reasons for taking this class
2. Your career goals (short term/long term)
3. Familiarity with computer technology
4. A brief discussion of how you view your current communication skill levels. Were there any parts of the quiz that surprised you? What are your strongest and weakest skills?
5. Is there anything in the class/syllabus that worries you? Any topic you are excited about or have extensive experience with?

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**2 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**3 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**4 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**5 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**5 pts**
Content	**2 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**3 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**4 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Development – Critical Thinking	**4 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**6 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**8 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**10 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**10 pts**
Grammar, Mechanics, Style	**2 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**3 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**4 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**5 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**5 pts**
				Total:	**25 pts**

1.4.7: Assignment- Seven Pillars of Communication

Open Pedagogy Assignments are assignments in which students use their agency and creativity to create knowledge artifacts that can support their own learning, their classmates' learning, and the learning of students around the world. (See this peer-reviewed article for more details.) The assignment on this page is aligned to a learning outcomes of Business Communication for Managers and we've identified the module where the reading appears. All of the assignments can be created with a cell phone camera or any video recording device, Google or Word documents, and your learning management system.

Learning Outcome

- Identify key features of effective writing in business

In the first module of the course, we introduce effective communication in a business setting. For this assignment, you are going to create a short video of less than two minutes about your experience with a business either as an employee or as a customer. Think about a time when you had a positive experience with communicating your perspective in a business setting.

It's one thing to read about the experiences of other people and it's quite another experience to see and listen to people's stories. For this assignment, let's use informal stories about your positive experiences to share what works for managers.

Using your cell phone or any other recording device, create a short video for this assignment. You don't have to edit or create a professional-grade film. You've most likely have done this type of recording already on social media, so feel free to use the same informal conversational tone.

Think of your audience as other students who are eager to improve their communication skills in a business setting. In your video, you'll want to practice using the concepts (in bold listed below) of the seven pillars of business communication.

If you need some questions to guide your response, here is a short list.

The seven pillars of communication have the following elements:

1. What was **clear** about the communication in your experience?
2. What were the **concise** details of the exchange?
3. What **objective** details can you give your audience about the event?
4. How were the speakers **consistent** in their messaging?
5. What left you feeling **complete** about the exchange?
6. What were the **relevant** details?
7. How did the company demonstrate **an understanding of audience knowledge?**

A Note To Teachers: Your students in the first term will create videos, and with their permission you can upload them into your course in order to show examples for the next term. The idea will be to have students generate content that other students can listen to and learn from with this assignment. Encourage them to use positive and negative examples from their work experience or from their experience as customers.

1.4.8: 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.

1.4.9: Introduction to 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.

1.4.10: Becoming a Better Employee

Learning Outcomes

Discuss how effective communication improves you as an 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.

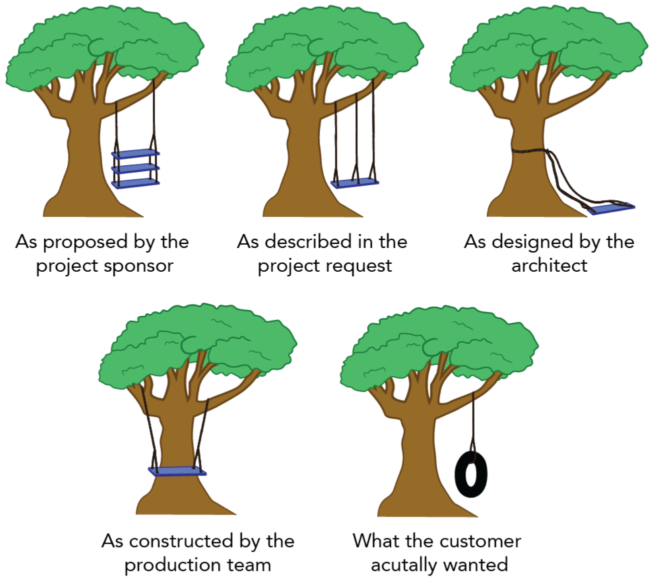


Figure 1. This common example of a tree swing shows just how things can go wrong as you create a new product or service.

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

https://assessments.lumenlearning.co...sessments/8488

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.

1.4.11: The Business Audience

Learning Outcomes

- Identify characteristics of your audience in business communication
- Discuss the process of the social communication model

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.

Practice Question

https://assessments.lumenlearning.co...sessments/8489

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

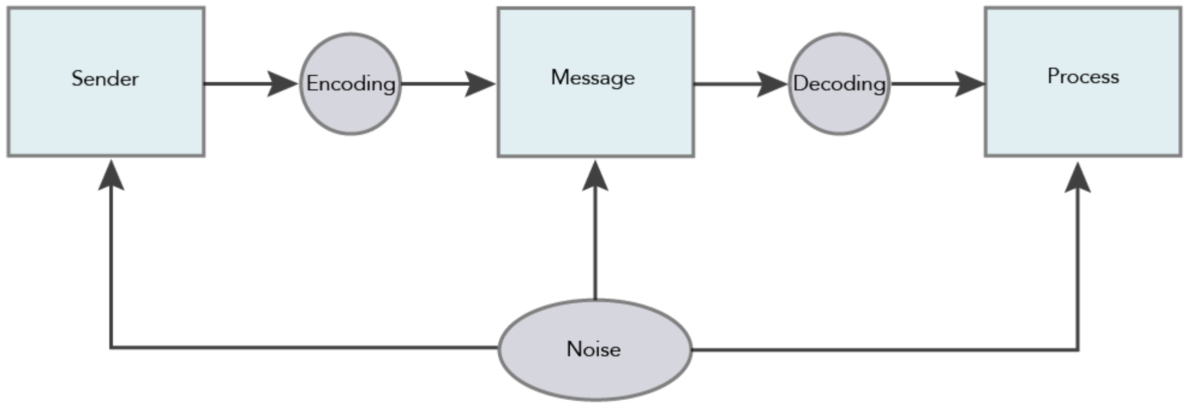
Communication suggests a linear process. There's a sender of a message—let's say that's you talking. You put your thoughts into words. And then there's a recipient of a message. He hears those words and considers their meaning. That's your co-worker, listening. It looks something like this:

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.

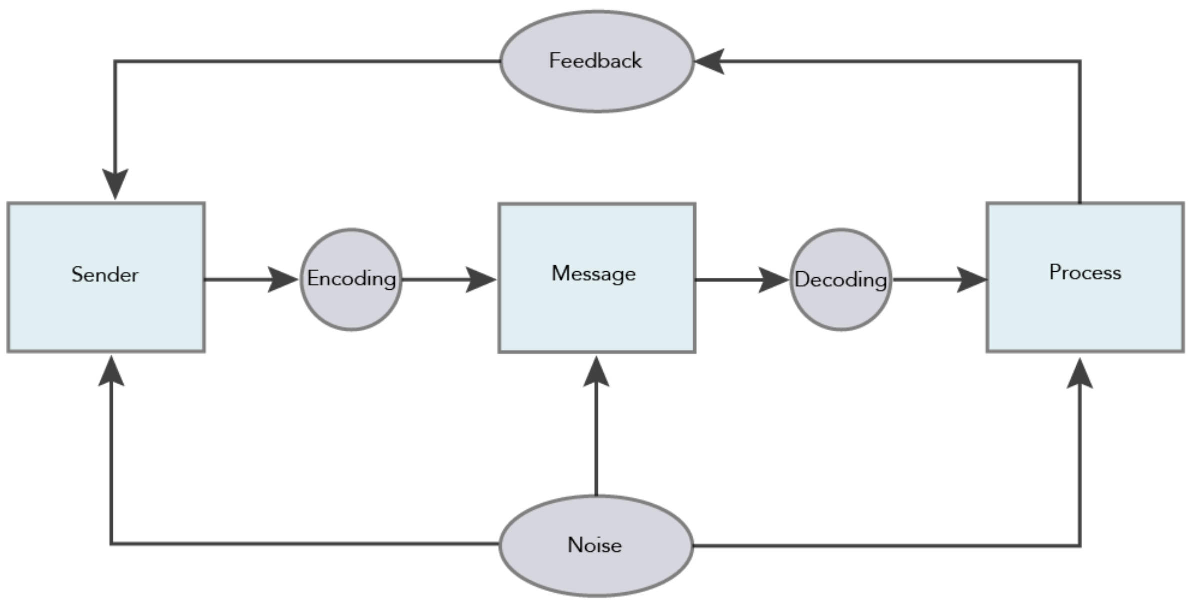
So, you're inspired by the music and sing the words in much the same way Jimi sings it. You think it, you put it into words (encoding it), and it becomes a message. Is everything good? Maybe not. It's possible that Jimi's "stylized" approach to singing lyrics is going to get in the way of your message.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

https://assessments.lumenlearning.co...sessments/8490

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1.4.12: Writing in Business

Learning Outcomes

- Identify key features of effective writing in business
- Discuss the overlap between professional and personal communication

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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1.4.13: Introduction to 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.

1.4.14: Listening

Learning Outcomes

- Discuss the importance of listening

Figure 1. Listening is a key component of communication.

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!

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.

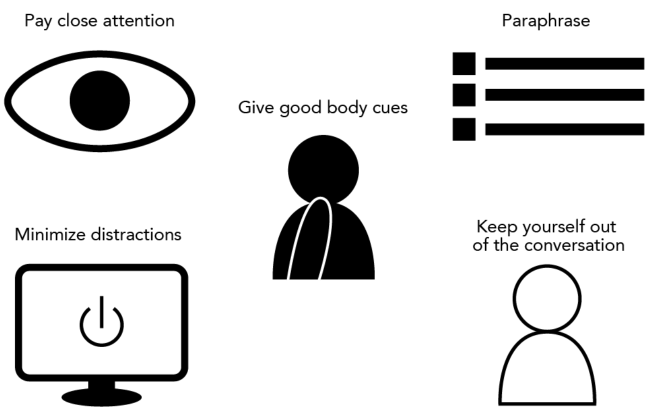

Figure 2. Five key skills for active listening

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.

1.4.15: Verbal and Nonverbal Communication

Learning Objectives

- Discuss verbal communication and its role in business
- Discuss nonverbal communication and its role in business

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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1.4.16: Introduction to 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 along 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.

Contributors and Attributions

SECTION OVERVIEW

1.5: Collaborating in Teams

1.5.1: Collaborative Writing

Learning Objectives

- Describe the process of collaborating with others to create a business message
- Discuss digital tools for 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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1.5.2: Introduction to 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.

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1.5.3: Interaction in the Workplace

Learning Objectives

- Discuss appropriate ways to behave in a 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 information about different cultural standards in business.

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

https://assessments.lumenlearning.co...sessments/8687

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.

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1.5.4: Company Events

Learning Objectives

- Discuss appropriate and inappropriate conduct at 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

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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.

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1.5.5: 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.

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1.5.6: Assignment- Collaboration in and Across Teams

Imagine you are the regional manager of a grocery store chain, and you are going to conduct a professional development session to teach your staff about team building techniques for more effective communication among departments.

You will form a group of 2–3 students. Your task is to each create a 4–5 minute presentation supported by PowerPoint slides on one of the following topics:

- Team Communication in the Workplace
- Collaborative Projects
- Establishing Workplace Etiquette

You should each choose a different topic as you will be presenting to one another in an online setting. Your PowerPoint presentation should have a minimum of 4 slides: a title page, content slides, and conclusion. You must email your instructor and your group a copy of your slide deck before the presentation.

Grading Rubric

Criteria	Not Evident	Developing	Exemplary	Points
Submit your slide deck	**0 pts** No slide deck submitted	**5 pts** Slide deck does not have at least 4 slides	**10 pts** Slide deck has at least 4 slides focused on a central theme	10 pts
Present within the allotted time	**0 pts** No presentation completed	**5 pts** Presentation is not within 4 to 5 minutes	**10 pts** Presentation is within 4 to 5 minutes	10 pts
Speak with appropriate volume, speed, and clarity	**0 pts** No presentation completed	**5 pts** Presentation cannot be heard, is too fast or too slow, or cannot be understood	**10 pts** Presentation is spoken at an adequate volume, speed, and clarity	10 pts
Present your slides effectively	**0 pts** No presentation completed	**10 pts** Presentation is disjointed, unprofessional, or too reliant on slide deck text	**20 pts** Presentation is professional and feels cohesive	20 pts
				Total: **50 pts**

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1.5.7: 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 to 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.

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1.5.8: Introduction to 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. 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.

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1.5.9: The Value of Teams in Business Communication

Learning Objectives

- Discuss the value of teams in business communication
- Discuss types of teams in organizations

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

https://assessments.lumenlearning.co...sessments/8678

Types of Teams

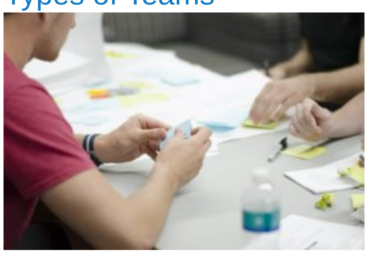

Figure 1. Companies create different types of teams for different purposes.

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.

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.[1] 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, and 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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Contributors and Attributions

1.5.10: Teams and Team Dynamics

Learning Objectives

Explain advantages and disadvantages of 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[1], 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. [2]

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.[3]

According to LaFasto and Larson in “When Teams Work Best,”[4] 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.”[5] 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.”[6]
- **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.”[7] 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.[8]

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.

Practice Question

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1.5.11: Group Communication Networks

Learning Objectives

Discuss impact of group size on communication

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.

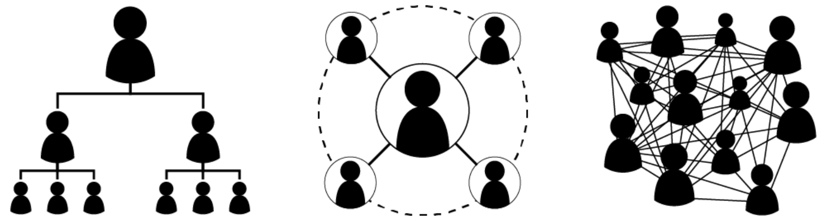

Figure 1. There is a wide spectrum of communication network styles in businesses

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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1.5.12: Conflict Resolution

Learning Objectives

- Describe various ways of interpreting and responding to conflict in interpersonal communication

Interpersonal conflict occurs in the workplace between individuals. Conflict 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."[1] 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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Contributors and Attributions

1.5.13: Introduction to 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.

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1.5.14: Decision Making In Groups

Learning Objectives

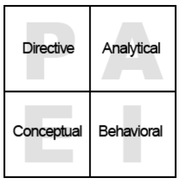
- Discuss different styles of decision making in groups

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[1] 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

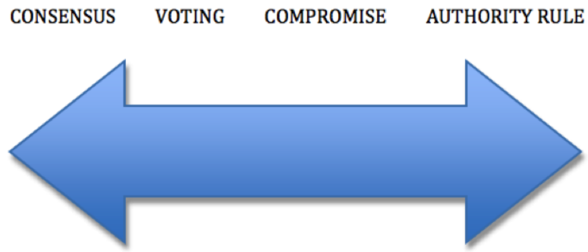
https://assessments.lumenlearning.co...sessments/8683

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[2]. 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.

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1. Rowe, A. J., & Boulgarides, J. D. (1992). *Managerial Decision Making.* New York: Macmillan Publishing Company. ↵
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Contributors and Attributions

1.5.15: Tools for Communicating with Groups

Learning Objectives

- Discuss digital 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 only 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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SECTION OVERVIEW

1.6: Social Diversity

1.6.1: Culture and Communication

Learning Objectives

- Describe strategies to adapt communication for an intercultural audience

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."[1] 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.[2]

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."[3] Perspective point: In the case of cultural relations, the sales adage "it is better to ask forgiveness than permission" does not apply.

Practice Question

https://assessments.lumenlearning.co...sessments/8696

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3. Ibid. ↵

Contributors and Attributions

1.6.2: Introduction to 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."[1]

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.

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1. Burke, Alison. "10 facts about American women in the workforce." *Brookings*, 05 Dec 2017. Web. 26 June 2018. ↵

Contributors and Attributions

1.6.3: Using Gender Neutral Language

Learning Objectives

- Discuss different strategies to use gender neutral language in business communication

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

https://assessments.lumenlearning.co...sessments/8697

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1.6.4: Attitudes and Gender Communication

Learning Objectives

- Compare and contrast how gender might impact communications styles

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.[1]

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.” [2]

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. Read Pichai’s note to employees here. His memo 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.”[3]

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.”[4]

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.”[5] 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.[6]

Practice Question

https://assessments.lumenlearning.co...sessments/8699

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2. David D. Day, ed., *The Oxford Handbook of Leadership and Organization.* Oxford: Oxford University Press, 2014. https://books.google.com/books?id=_iqTAwAAQBAJ&pg=PA735&lpg=PA735&dq=gender+bias+language+nancy+pelosi&source=bl&ots=SzNkjbkn7-&sig=kQoD7GfBYJDX_fujtCZXqkV8t2c&hl=en&sa=X&ved=0ahUKEwiGh7qcj8faAhULbK0KHXg7D9kQ6AEIRzAF#v=onepage&q=gender%20bias%20language%20nancy%20pelosi&f=false↵
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4. Ibid. ↵
5. Penza, Matthew. "Princeton Students Can Choose Any – or Every – Gender Identity." Campus Reform. July 31, 2017. Accessed August 5, 2019. https://www.campusreform.org/?ID=9513↵
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Contributors and Attributions

1.6.5: Introduction to 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.

Contributors and Attributions

1.6.6: Disabilities

Learning Objectives

- 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.[1]

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

https://assessments.lumenlearning.co...sessments/8700

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."[2] 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 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

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1.6.7: Introduction to 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.

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1.6.8: Working across Generations

Learning Objectives

- 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[1]:

	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. (Cell Phone Activities 2013 – Pew Internet)
2. The average Millennial exchanges an average of 67 text messages per day (Kids Send a Mind Boggling Number of Text Every Month – Business Insider)
3. On average, Americans exchange twice as many texts as they do calls (Mobile Texting Usage in the U.S. – Nielsen)

Practice Question

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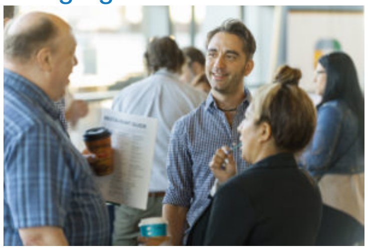
Bridging the Generation Gap



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."[2]

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.[3] 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:[4]

- 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."[5]

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."[6] 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

https://assessments.lumenlearning.co...sessments/8702

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- people talking. **Authored by**: Oregon Department of Transportation . **Located at**: https://www.flickr.com/photos/oregondot/38552104441/in/album-72157690819747296/. **License**: *CC BY: Attribution*

1.6.9: Introduction to 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.

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1.6.10: Stereotypes, Prejudice, and Discrimination

Learning Objectives

- Describe the differences between 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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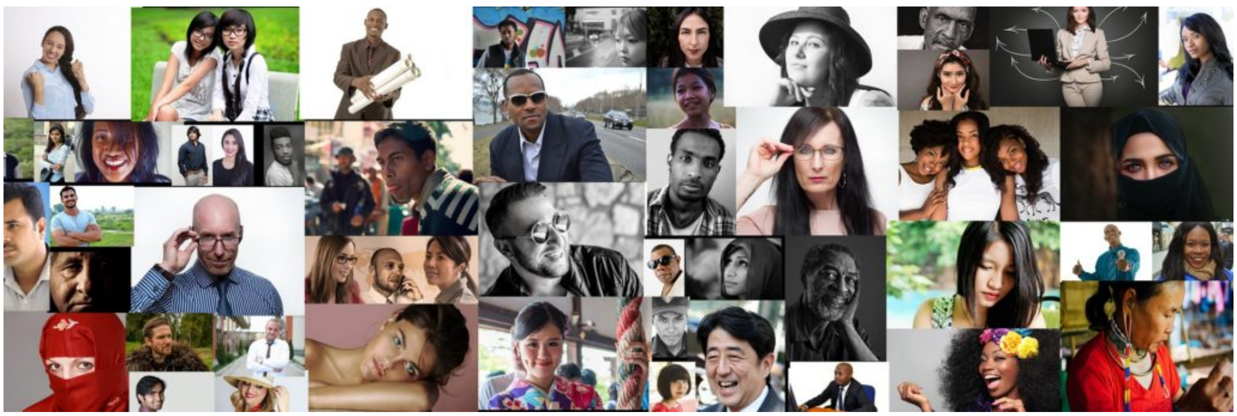
1.6.11: Why It Matters- Social Diversity in the Workplace

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!

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1.6.12: Bias in the Workplace

Learning Objectives

- Discuss the impact bias might have on communication 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.*

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=614

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

https://assessments.lumenlearning.co...sessments/8705

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1.6.13: 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."[1]

To put that belief into practice, the company surveyed employees world-wide. Using that input, Nike identified 4 core themes[2]:

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.[3]

Despite the odds, Nike is "winning" in its quest for equality. In fiscal year 2014–2015, minorities became the majority of US staff.[4] 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.[5]

Learn More

For additional perspective on creating a functional workplace, read the First Round article.

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1.6.14: Assignment- Social Diversity in the Workplace

You are one of four co-founders of a new start-up company producing a new line of meal-replacement drinks. You and your co-founders have had two promising years of producing and selling your product, and now you're looking to expand the team and grow the business.

One of the things you're most looking forward to with expanding the company is increasing the diversity of the team. You began the company with some friends who had similar interests who have hired like-minded friends, making the company feel very homogeneous. As you've grown as a company, you're started to worry about the product becoming too niche without the input of other points of view. In casual conversation, another co-founder brought up the idea that the like-mindedness of the team is essential for the company's continued success. You refuted the idea and mentioned the importance of having diverse opinions, but you didn't feel like you had enough information or data to make your point credible at the time.

Your task as a leader is to effectively communicate the importance of social diversity in the workplace to the whole company. You may choose one of the following methods to inform the team about the planned company expansion by emphasizing the importance of hiring diverse employees. For this assignment, you can choose one of the three methods:

- Write an email to be sent to the full company.
- Create a presentation to show first to your co-founders, then to the rest of the company.
- Create an informal report showing the positive impact of social diversity in other companies.

In your short rationale (no more than 150 words) explain why you chose the method you did.

Please note: There is no "correct" way to present this message; it will depend on which method you think would be best for your colleagues.

Grading Rubric

Criteria	Not Evident	Developing	Exemplary	Points
Discuss the plan to expand the team	**0 pts** No presentation completed	**5 pts** Expansion is not discussed	**10 pts** Expansion is discussed	10 pts
Discuss the importance of social diversity	**0 pts** No presentation completed	**10 pts** Discussion shows a lack of understanding of diversity	**20 pts** Discussion shows an understanding of diversity and respect of individuals with different qualities and abilities	20 pts
Provide support for the benefits of social diversity	**0 pts** No slide deck submitted	**5 pts** No support is provided	**10 pts** Support is provided	10 pts
Provide a short rationale	**0 pts** No response to peers	**5 pts** Rationale does not meet required words criteria	**10 pts** Rationale is under 150 words	10 pts
			Total:	**50 pts**

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1.6.15: Introduction to 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.

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1.6.16: Factors of Diversity

Learning Objectives

- Identify factors that define a diverse group of employees

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 [1]

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

https://assessments.lumenlearning.co...sessments/8689

1. "Diversity." Merriam-Webster.com. Merriam-Webster, n.d. Web. 7 May 2018. ↵

Contributors and Attributions

1.6.17: Advantages of Employee Diversity

Learning Objectives

- Explain the advantages of employee diversity within organizations

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."[1] 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."[2] The conclusion drawn from their 2015 *Why Diversity Matters* report still applies: "diversity is a competitive differentiator shifting market share toward more diverse companies."[3]

Practice Question

https://assessments.lumenlearning.co...sessments/8690

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1. 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. ↵
2. McKinsey&Company. *Delivering Through Diversity*, Jan 2018. Web. 26 June 2018. ↵
3. McKinsey&Company. *Diversity Matters*, 2015. Web. 26 June 2018. ↵

Contributors and Attributions

1.6.18: Challenges of Employee Diversity

Learning Objectives

- Explain the challenges of employee diversity within organizations

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 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.

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

https://assessments.lumenlearning.co...sessments/8691

Contributors and Attributions

1.6.19: Introduction to 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.

Contributors and Attributions

1.6.20: Race and Ethnicity

Learning Objectives

- Compare and contrast race and ethnicity
- Discuss how cultural differences among races may influence communication

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."[1]

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."[2]

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

https://assessments.lumenlearning.co...sessments/8692

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?

[practice-area rows="4″][/practice-area]

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?

[practice-area rows=”4″][/practice-area]

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.[3] 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

https://assessments.lumenlearning.co...sessments/8693

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1. 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. ↵
2. Ibid. ↵
3. 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. ↵

Contributors and Attributions

1.6.21: Countries

Learning Objectives

- Discuss how cultural differences among individuals from different countries may influence communication

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.[1]

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.[2] 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."[3]

Practice Question

https://assessments.lumenlearning.co...sessments/8694

1. Magloff, Lisa. "Cross-Cultural Business Etiquette," *Chron*. Web. 26 June 2018. ↵
2. Tullos, Jolie. *Hand Gestures and Miscommunications*, 13 Jan 2014. Web. 26 June 2018. ↵
3. Ibid. ↵

Contributors and Attributions

1.6.22: Religion

Learning Objectives

- Discuss how cultural differences among individuals from different religions may influence communication

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.”[1] 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

https://assessments.lumenlearning.co...sessments/8695

1. Murphy, Caryle. "Nike Pulls Shoes that Irked Muslims." *The Washington Post*, 25 Jun 1997. Web. 26 June 2018. ↵

Contributors and Attributions

1.7: Gap

CHAPTER OVERVIEW

2: Planning, Writing, and Revising

SECTION OVERVIEW

2.1: Delivering Your Message

Thumbnail: pixabay.com/photos/michelang...y-child-71282/

2.1.1: What is Language?

Learning Objectives

- Describe and define "language."
- Describe the role of language in perception and the communication process.

Are you reading this sentence? Does it make sense to you? When you read the words I wrote, what do you hear? A voice in your head? Words across the internal screen of your mind? If it makes sense, then you may very well hear the voice of the author as you read along, finding meaning in these arbitrary symbols packaged in discrete units called words. The words themselves have no meaning except that which you give them.

For example, I'll write the word "home," placing it in quotation marks to denote its separation from the rest of this sentence. When you read that word, what comes to mind for you? A specific place? Perhaps a building that could also be called a house? Images of people or another time? "Home," like "love" and many other words, is quite individual and open to interpretation.

Still, even though your mental image of home may be quite distinct from mine, we can communicate effectively. You understand that each sentence has a subject and verb, and a certain pattern of word order, even though you might not be consciously aware of that knowledge. You weren't born speaking or writing, but you mastered—or, more accurately, are still mastering as we all are—these important skills of self-expression. The family, group, or community wherein you were raised taught you the code. The code came in many forms. When do you say "please" or "thank you," and when do you remain silent? When is it appropriate to communicate? If it is appropriate, what are the expectations and how do you accomplish it? You know because you understand the code.

We often call this code "language": a system of symbols, words, and/or gestures used to communicate meaning. Does everyone on earth speak the same language? Obviously, no. People are raised in different cultures, with different values, beliefs, customs, and different languages to express those cultural attributes. Even people who speak the same language, like speakers of English in London, New Delhi, or Cleveland, speak and interact using their own words that are community-defined, self-defined, and have room for interpretation. Within the United States, depending on the context and environment, you may hear colorful sayings that are quite regional, and may notice an accent, pace, or tone of communication that is distinct from your own. This variation in our use of language is a creative way to form relationships and communities, but can also lead to miscommunication.

Words themselves, then, actually hold no meaning. It takes you and me to use them to give them life and purpose. Even if we say that the dictionary is the repository of meaning, the repository itself has no meaning without you or me to read, interpret, and use its contents. Words change meaning over time. "Nice" once meant overly particular or fastidious; today it means pleasant or agreeable. "Gay" once meant happy or carefree; today it refers to homosexuality. The dictionary entry for the meaning of a word changes because we change how, when, and why we use the word, not the other way around. Do you know every word in the dictionary? Does anyone? Even if someone did, there are many possible meanings of the words we exchange, and these multiple meanings can lead to miscommunication.

Business communication veterans often tell the story of a company that received an order of machine parts from a new vendor. When they opened the shipment, they found that it contained a small plastic bag into which the vendor had put several of the parts. When asked what the bag was for, the vendor explained, "Your contract stated a thousand units, with maximum 2 percent defective. We produced the defective units and put them in the bag for you." If you were the one reading that contract, what would "defective" mean to you? We may use a word intending to communicate one idea only to have a coworker miss our meaning entirely.

Sometimes we want our meaning to be crystal clear, and at other times, less so. We may even want to present an idea from a specific perspective, one that shows our company or business in a positive light. This may reflect our intentional manipulation of language to influence meaning, as in choosing to describe a car as "preowned" or an investment as a "unique value proposition." We may also influence other's understanding of our words in unintentional ways, from failing to anticipate their response, to ignoring the possible impact of our word choice.

Languages are living exchange systems of meaning, and are bound by context. If you are assigned to a team that coordinates with suppliers from Shanghai, China, and a sales staff in Dubuque, Iowa, you may encounter terms from both groups that influence your team.

As long as there have been languages and interactions between the people who speak them, languages have borrowed words (or, more accurately, adopted—for they seldom give them back). Think of the words "boomerang," "limousine," or "pajama"; do you know which languages they come from? Did you know that "algebra" comes from the Arabic word "al-jabr," meaning "restoration"?

Does the word "moco" make sense to you? It may not, but perhaps you recognize it as the name chosen by Nissan for one of its cars. "Moco" makes sense to both Japanese and Spanish speakers, but with quite different meanings. The letters come together to form an arbitrary word that refers to the thought or idea of the thing in the semantic triangle (Figure 2.1.1.1).

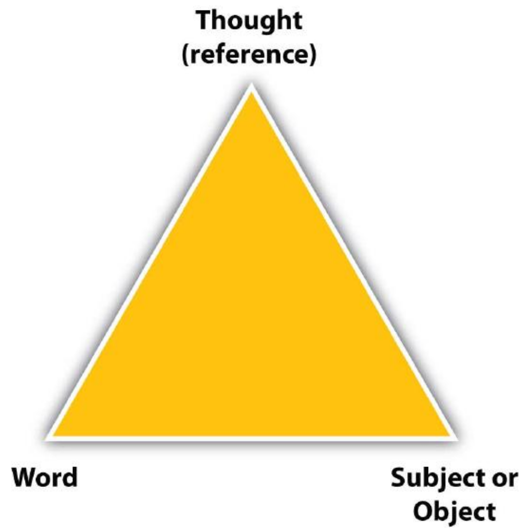

Figure 2.1.1.1: Semantic Triangle. Source: Adapted from Ogden and Richards.

This triangle illustrates how the word (which is really nothing more than a combination of four letters) refers to the thought, which then refers to the thing itself. Who decides what "moco" means? To the Japanese, it may mean "cool design," or even "best friend," and may be an apt name for a small, cute car, but to a Spanish speaker, it means "booger" or "snot"—not a very appealing name for a car.

Each letter stands for a sound, and when they come together in a specific way, the sounds they represent when spoken express the "word" that symbolizes the event (McLean, 2003). For our discussion, the key word we need to address is "symbolizes." The word stands in for the actual event, but is not the thing itself. The meaning we associate with it may not be what we intended. For example, when Honda was contemplating the introduction of the Honda Fit, another small car, they considered the name "Fitta" for use in Europe. As the story goes, the Swedish Division Office of Honda explained that "fitta" in Swedish is a derogatory term for female reproductive organ. The name was promptly changed to "Jazz."

The meaning, according to Hayakawa, is within us, and the word serves as a link to meaning. What will your words represent to the listener? Will your use of a professional term enhance your credibility and be more precise with a knowledgeable audience, or will you confuse them?

Key Takeaway

Language is a system of words used as symbols to convey ideas, and it has rules of syntax, semantics, and context. Words have meaning only when interpreted by the receiver of the message.

Exercises

1. Using a dictionary that gives word origins, such as the *American Heritage College Dictionary*, *Merriam-Webster's Collegiate Dictionary*, or the *New Oxford American Dictionary*, find at least ten English words borrowed from other languages. Share your findings with your classmates.
2. Visit several English-language Web sites from different countries—for example, Australia, Canada, and the United States. What differences in spelling and word usage do you find? Discuss your results with your classmates.
3. From your viewpoint, how do you think thought influences the use of language? Write a one- to two-page explanation.
4. What is meant by *conditioned* in this statement: "people in Western cultures do not realize the extent to which their racial attitudes have been conditioned since early childhood by the power of words to ennoble or condemn, augment or detract, glorify

or demean?" (Moore, 2003) Discuss your thoughts with a classmate.

5. Translations gone wrong can teach us much about words and meaning. Can you think of a word or phrase that just doesn't sound right when it was translated from English into another language, or vice versa? Share it with the class and discuss what a better translation would be.

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2.1.2: Messages

Learning Objectives

- Describe three different types of messages and their functions.
- Describe five different parts of a message and their functions.

Before we explore the principles of language, it will be helpful to stop for a moment and examine some characteristics of the messages we send when we communicate. When you write or say something, you not only share the meaning(s) associated with the words you choose, but you also say something about yourself and your relationship to the intended recipient. In addition, you say something about what the relationship means to you as well as your assumed familiarity as you choose formal or informal ways of expressing yourself. Your message may also carry unintended meanings that you cannot completely anticipate. Some words are loaded with meaning for some people, so that by using such words you can "push their buttons" without even realizing what you've done. Messages carry far more than the literal meaning of each word, and in this section we explore that complexity.

Primary Message Is Not the Whole Message

When considering how to effectively use verbal communication, keep in mind there are three distinct types of messages you will be communicating: primary, secondary, and auxiliary (Hasling, 1998).

Primary messages refer to the intentional content, both verbal and nonverbal. These are the words or ways you choose to express yourself and communicate your message. For example, if you are sitting at your desk and a coworker stops by to ask you a question, you may say, "Here, have a seat." These words are your primary message.

Even such a short, seemingly simple and direct message could be misunderstood. It may seem obvious that you are not literally offering to "give" a "seat" to your visitor, but to someone who knows only formal English and is unfamiliar with colloquial expressions, it may be puzzling. "Have a seat" may be much more difficult to understand than "please sit down."

Secondary messages refer to the unintentional content, both verbal and nonverbal. Your audience will form impressions of your intentional messages, both negative and positive, over which you have no control. Perceptions of physical attractiveness, age, gender, or ethnicity or even simple mannerisms and patterns of speech may unintentionally influence the message.

Perhaps, out of courtesy, you stand up while offering your visitor a seat; or perhaps your visitor has an expectation that you ought to do so. Perhaps a photograph of your family on your desk makes an impression on your visitor. Perhaps a cartoon on your bulletin board sends a message.

Auxiliary messages refer to the intentional and unintentional ways a primary message is communicated. This may include vocal inflection, gestures and posture, or rate of speech that influence the interpretation or perception of your message.

When you say, "Here, have a seat," do you smile and wave your hand to indicate the empty chair on the other side of your desk? Or do you look flustered and quickly lift a pile of file folders out of the way? Are your eyes on your computer as you finish sending an e-mail before turning your attention to your visitor? Your auxiliary message might be, "I'm glad you came by, I always enjoy exchanging ideas with you" or "I always learn something new when someone asks me a question." On the other hand, it might be, "I'll answer your question, but I'm too busy for a long discussion," or maybe even, "I wish you'd do your work and not bother me with your dumb questions!"

Parts of a Message

When you create a message, it is often helpful to think of it as having five parts:

1. Attention statement
2. Introduction
3. Body
4. Conclusion
5. Residual message

Each of these parts has its own function.

The attention statement, as you may guess, is used to capture the attention of your audience. While it may be used anywhere in your message, it is especially useful at the outset. There are many ways to attract attention from readers or listeners, but one of the most effective is the "what's in it for me" strategy: telling them how your message can benefit them. An attention statement like, "I'm going to explain how you can save up to $500 a year on car insurance" is quite likely to hold an audience's attention.

Once you have your audience's attention, it is time to move on to the introduction. In your introduction you will make a clear statement your topic; this is also the time to establish a relationship with your audience. One way to do this is to create common ground with the audience, drawing on familiar or shared experiences, or by referring to the person who introduced you. You may also explain why you chose to convey this message at this time, why the topic is important to you, what kind of expertise you have, or how your personal experience has led you to share this message.

After the introduction comes the body of your message. Here you will present your message in detail, using any of a variety of organizational structures. Regardless of the type of organization you choose for your document or speech, it is important to make your main points clear, provide support for each point, and use transitions to guide your readers or listeners from one point to the next.

At the end of the message, your conclusion should provide the audience with a sense of closure by summarizing your main points and relating them to the overall topic. In one sense, it is important to focus on your organizational structure again and incorporate the main elements into your summary, reminding the audience of what you have covered. In another sense, it is important not to merely state your list of main points again, but to convey a sense that you have accomplished what you stated you would do in your introduction, allowing the audience to have psychological closure.

The residual message, a message or thought that stays with your audience well after the communication is finished, is an important part of your message. Ask yourself of the following:

- What do I want my listeners or readers to remember?
- What information do I want to have the audience retain or act upon?
- What do I want the audience to do?

Key Takeaway

Messages are primary, secondary, and auxiliary. A message can be divided into a five-part structure composed of an attention statement, introduction, body, conclusion, and residual message.

Exercises

1. Choose three examples of communication and identify the primary message. Share and compare with classmates.
2. Choose three examples of communication and identify the auxiliary message(s). Share and compare with classmates.
3. Think of a time when someone said something like "please take a seat" and you correctly or incorrectly interpreted the message as indicating that you were in trouble and about to be reprimanded. Share and compare with classmates.
4. How does language affect self-concept? Explore and research your answer, finding examples that can serve as case studies.
5. Choose an article or opinion piece from a major newspaper or news Web site. Analyze the piece according to the five-part structure described here. Does the headline serve as a good attention statement? Does the piece conclude with a sense of closure? How are the main points presented and supported? Share your analysis with your classmates. For a further challenge, watch a television commercial and do the same analysis.

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2.1.3: Principles of Verbal Communication

Learning Objectives

- Identify and describe five key principles of verbal communication.
- Explain how the rules of syntax, semantics, and context govern language.
- Describe how language serves to shape our experience of reality.

Verbal communication is based on several basic principles. In this section, we'll examine each principle and explore how it influences everyday communication. Whether it's a simple conversation with a coworker or a formal sales presentation to a board of directors, these principles apply to all contexts of communication.

Language Has Rules

Language is a code, a collection of symbols, letters, or words with arbitrary meanings that are arranged according to the rules of syntax and are used to communicate (Pearson & Nelson, 2000).

In the first of the Note 2.1 "Introductory Exercises" for this chapter, were you able to successfully match the terms to their meanings? Did you find that some of the definitions did not match your understanding of the terms? The words themselves have meaning within their specific context or language community. But without a grasp of that context, "my bad" may have just sounded odd. Your familiarity with the words and phrases may have made the exercise easy for you, but it isn't an easy exercise for everyone. The words themselves only carry meaning if you know the understood meaning and have a grasp of their context to interpret them correctly.

There are three types of rules that govern or control our use of words. You may not be aware that they exist or that they influence you, but from the moment you put a word into text or speak it, these rules govern your communications. Think of a word that is all right to use in certain situations and not in others. Why? And how do you know?

Syntactic rules govern the order of words in a sentence. In some languages, such as German, syntax or word order is strictly prescribed. English syntax, in contrast, is relatively flexible and open to style. Still, there are definite combinations of words that are correct and incorrect in English. It is equally correct to say, "Please come to the meeting in the auditorium at twelve noon on Wednesday" or, "Please come to the meeting on Wednesday at twelve noon in the auditorium." But it would be incorrect to say, "Please to the auditorium on Wednesday in the meeting at twelve noon come."

Semantic rules govern the meaning of words and how to interpret them (Martinich, 1996). Semantics is the study of meaning in language. It considers what words mean, or are intended to mean, as opposed to their sound, spelling, grammatical function, and so on. Does a given statement refer to other statements already communicated? Is the statement true or false? Does it carry a certain intent? What does the sender or receiver need to know in order to understand its meaning? These are questions addressed by semantic rules.

Contextual rules govern meaning and word choice according to context and social custom. For example, suppose Greg is talking about his coworker, Carol, and says, "She always meets her deadlines." This may seem like a straightforward statement that would not vary according to context or social custom. But suppose another coworker asked Greg, "How do you like working with Carol?" and, after a long pause, Greg answered, "She always meets her deadlines." Are there factors in the context of the question or social customs that would influence the meaning of Greg's statement?

Even when we follow these linguistic rules, miscommunication is possible, for our cultural context or community may hold different meanings for the words used than the source intended. Words attempt to represent the ideas we want to communicate, but they are sometimes limited by factors beyond our control. They often require us to negotiate their meaning, or to explain what we mean in more than one way, in order to create a common vocabulary. You may need to state a word, define it, and provide an example in order to come to an understanding with your audience about the meaning of your message.

Our Reality Is Shaped by Our Language

What would your life be like if you had been raised in a country other than the one where you grew up? Malaysia, for example? Italy? Afghanistan? Or Bolivia? Or suppose you had been born male instead of female, or vice versa. Or had been raised in the northeastern United States instead of the Southwest, or the Midwest instead of the Southeast. In any of these cases, you would not have the same identity you have today. You would have learned another set of customs, values, traditions, other language patterns, and ways of communicating. You would be a different person who communicated in different ways.

You didn't choose your birth, customs, values, traditions, or your language. You didn't even choose to learn to read this sentence or to speak with those of your community, but somehow you accomplished this challenging task. As an adult, you can choose to see things from a new or diverse perspective, but what language do you think with? It's not just the words themselves, or even how they are organized, that makes communication such a challenge. Your language itself, ever changing and growing, in many ways determines your reality (Whorf, 1956). You can't escape your language or culture completely, and always see the world through a shade or tint of what you've been taught, learned, or experienced.

Suppose you were raised in a culture that values formality. At work, you pride yourself on being well dressed. It's part of your expectation for yourself and, whether you admit it or not, for others. Many people in your organization, however, come from less formal cultures, and they prefer business casual attire. You may be able to recognize the difference, and because humans are highly adaptable, you may get used to a less formal dress expectation, but it won't change your fundamental values.

Thomas Kuhn makes the point that "paradigms, or a clear point of view involving theories, laws, and/or generalizations that provide a framework for understanding, tend to form and become set around key validity claims, or statements of the way things work." (McLean, 2003) The paradigm, or worldview, may be individual or collective. And paradigm shifts are often painful. New ideas are always suspect, and usually opposed, without any other reason than because they are not already common (Ackerman, 1980).

As an example, consider the earth-heavens paradigm. Medieval Europeans believed that the Earth was flat and that the edge was to be avoided, otherwise you might fall off. For centuries after the acceptance of a "round earth" belief, the earth was still believed to be the center of the universe, with the sun and all planets revolving around it. Eventually, someone challenged the accepted view. Over time, despite considerable resistance to protect the status quo, people came to better understand the earth and its relationship to the heavens.

In the same way, the makers of the Intel microprocessor once thought that a slight calculation error, unlikely to negatively impact 99.9 percent of users, was better left as is and hidden (Emery, 1996). Like many things in the information age, the error was discovered by a user of the product, became publicly known, and damaged Intel's credibility and sales for years. Recalls and prompt, public communication in response to similar issues are now the industry-wide protocol.

Paradigms involve premises that are taken as fact. Of course the Earth is the center of the universe, of course no one will ever be impacted by a mathematical error so far removed from most people's everyday use of computers, and of course you never danced the macarena at a company party. We now can see how those facts, attitudes, beliefs, and ideas of "cool" are overturned.

How does this insight lend itself to your understanding of verbal communication? Do all people share the same paradigms, words, or ideas? Will you be presenting ideas outside your audience's frame of reference? Outside their worldview? Just as you look back at your macarena performance, get outside your frame of reference and consider how to best communicate your thoughts, ideas, and points to an audience that may not have your same experiences or understanding of the topic.

By taking into account your audience's background and experience, you can become more "other-oriented," a successful strategy to narrow the gap between you and your audience. Our experiences are like sunglasses, tinting the way we see the world. Our challenge, perhaps, is to avoid letting them function as blinders, like those worn by working horses, which create tunnel vision and limit our perspective.

Language Is Arbitrary and Symbolic

As we have discussed previously, words, by themselves, do not have any inherent meaning. Humans give meaning to them, and their meanings change across time. The arbitrary symbols, including letters, numbers, and punctuation marks, stand for concepts in our experience. We have to negotiate the meaning of the word "home," and define it, through visual images or dialogue, in order to communicate with our audience.

Words have two types of meanings: denotative and connotative. Attention to both is necessary to reduce the possibility of misinterpretation. The denotative meaning is the common meaning, often found in the dictionary. The connotative meaning is often not found in the dictionary but in the community of users itself. It can involve an emotional association with a word, positive or negative, and can be individual or collective, but is not universal.

With a common vocabulary in both denotative and connotative terms, effective communication becomes a more distinct possibility. But what if we have to transfer meaning from one vocabulary to another? That is essentially what we are doing when we translate a message. In such cases, language and culture can sometimes make for interesting twists. The *New York Times* (Sterngold, 1998) noted that the title of the 1998 film *There's Something About Mary* proved difficult to translate when it was released in foreign markets. The movie was renamed to capture the idea and to adapt to local audiences' frame of reference: In Poland, where blonde jokes are popular and common, the film title (translated back to English for our use) was *For the Love of a Blonde*. In France, *Mary at All Costs* communicated the idea, while in Thailand *My True Love Will Stand All Outrageous Events* dropped the reference to Mary altogether.

Capturing our ideas with words is a challenge when both conversational partners speak the same language, but across languages, cultures, and generations the complexity multiplies exponentially.

Language Is Abstract

Words represent aspects of our environment, and can play an important role in that environment. They may describe an important idea or concept, but the very act of labeling and invoking a word simplifies and distorts our concept of the thing itself. This ability to simplify concepts makes it easier to communicate, but it sometimes makes us lose track of the specific meaning we are trying to convey through abstraction. Let's look at one important part of life in America: transportation.

Take the word "car" and consider what it represents. Freedom, status, or style? Does what you drive say something about you? To describe a car as a form of transportation is to consider one of its most basic and universal aspects. This level of abstraction means we lose individual distinctions between cars until we impose another level of labeling. We could divide cars into sedans (or saloon) and coupe (or coupé) simply by counting the number of doors (i.e., four versus two). We could also examine cost, size, engine displacement, fuel economy, and style. We might arrive at an American classic, the Mustang, and consider it for all these factors and its legacy as an accessible American sports car. To describe it in terms of transportation only is to lose the distinctiveness of what makes a Mustang a desirable American sports car.

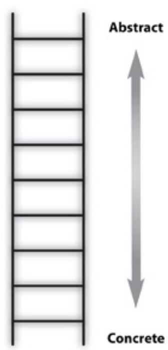

Figure 2.1.3.1: Abstraction Ladder. Source: Adapted from J. DeVito's Abstraction Ladder (DeVito, 1999).

We can see how, at the extreme level of abstraction, a car is like any other automobile. We can also see how, at the base level, the concept is most concrete. "Mustang," the name given to one of the best-selling American sports cars, is a specific make and model with specific markings; a specific size, shape, and range of available colors; and a relationship with a classic design. By focusing on concrete terms and examples, you help your audience grasp your content.

Language Organizes and Classifies Reality

We use language to create and express some sense of order in our world. We often group words that represent concepts by their physical proximity or their similarity to one another. For example, in biology, animals with similar traits are classified together. An ostrich may be said to be related to an emu and a nandu, but you wouldn't group an ostrich with an elephant or a salamander. Our ability to organize is useful, but artificial. The systems of organization we use are not part of the natural world but an expression of our views about the natural world.

What is a doctor? A nurse? A teacher? If a male came to mind in the case of the word "doctor" and a female came to mind in reference to "nurse" or "teacher," then your habits of mind include a gender bias. There was once a time in the United States where that gender stereotype was more than just a stereotype, it was the general rule, the social custom, the norm. Now it no longer holds true. More and more men are training to serve as nurses. *Business Week* noted in 2008 that one-third of the U.S. physician workforce was female (Arnst, 2005).

We all use systems of classification to navigate through the world. Imagine how confusing life would be if we had no categories such as male/female, young/old, tall/short, doctor/nurse/teacher. These categories only become problematic when we use them to uphold biases and ingrained assumptions that are no longer valid. We may assume, through our biases, that elements are related when they have no relationship at all. As a result, our thinking is limited and our grasp of reality impaired. It is often easier to spot these biases in others, but it behooves us as communicators to become aware of them in ourselves. Holding them unconsciously will limit our thinking, our grasp of reality, and our ability to communicate successfully.

Key Takeaway

Language is a system governed by rules of syntax, semantics, and context; we use paradigms to understand the world and frame our communications.

Exercises

1. Write at least five examples of English sentences with correct syntax. Then rewrite each sentence, using the same words in an order that displays incorrect syntax. Compare your results with those of your classmates.
2. Think of at least five words whose denotative meaning differs from their connotative meaning. Use each word in two sentences, one employing the denotative meaning and the other employing the connotative. Compare your results with those of your classmates.
3. Do you associate meaning with the car someone drives? Does it say something about them? List five cars you observe people you know driving and discuss each one, noting whether you perceive that the car says something about them or not. Share and compare with classmates.

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2.1.4: Language Can be an Obstacle to Communication

Learning Objectives

1. Demonstrate six ways in which language can be an obstacle or barrier to communication.
2. Explain the differences between clichés, jargon, and slang.
3. Explain the difference between sexist or racist language and legitimate references to gender or race in business communication.

As you use language to make sense of your experiences, as part of our discussion, you no doubt came to see that language and verbal communication can work both for you and against you. Language allows you to communicate, but it also allows you to miscommunicate and misunderstand. The same system we use to express our most intimate thoughts can be frustrating when it fails to capture our thoughts, to represent what we want to express, and to reach our audience. For all its faults, though, it is the best system we have, and part of improving the communication process is the clear identification of where it breaks down. Anticipate where a word or expression may need more clarification and you will be on your way to reducing errors and improving verbal communication.

In an article titled “The Miscommunication Gap,” Susan Washburn lists several undesirable results of poor communication in business:

- Damaged relationships
- Loss of productivity
- Inefficiency and rework
- Conflict
- Missed opportunities
- Schedule slippage (delays, missed deadlines)
- Scope creep…or leap (gradual or sudden changes in an assignment that make it more complex and difficult than it was originally understood to be)
- Wasted resources
- Unclear or unmet requirements

In this section we discuss how words can serve either as a bridge, or a barrier, to understanding and communication of meaning. Our goals of effective and efficient business communication mean an inherent value of words and terms that keeps the bridge clear and free of obstacles.

Cliché

A cliché is a once-clever word or phrase that has lost its impact through overuse. If you spoke or wrote in clichés, how would your audience react? Let’s try it. How do you react when you read this sentence: “A cliché is something to avoid like the plague, for it is nothing but a tired old war horse, and if the shoe were on the other foot you too would have an axe to grind”? As you can see, the problem with clichés is that they often sound silly or boring.

Clichés are sometimes a symptom of lazy communication—the person using the cliché hasn’t bothered to search for original words to convey the intended meaning. Clichés lose their impact because readers and listeners tend to gloss over them, assuming their common meaning while ignoring your specific use of them. As a result, they can be obstacles to successful communication.

Jargon

Let’s pretend you’ve been assigned to the task of preparing a short presentation on your company’s latest product for a group of potential customers. It’s a big responsibility. You only have one opportunity to get it right. You will need to do extensive planning and preparation, and your effort, if done well, will produce a presentation that is smooth and confident, looking simple to the casual audience member.

What words do you use to communicate information about your product? Is your audience familiar with your field and its specialized terms? As potential customers, they are probably somewhat knowledgeable in the field, but not to the extent that you and your coworkers are; even less so compared to the “techies” who developed the product. For your presentation to succeed, your challenge is to walk a fine line between using too much profession-specific language on the one hand, and "talking down" to your audience on the other hand.

While your potential customers may not understand all the engineering and schematic detail terms involved in the product, they do know what they and their organizations are looking for in considering a purchase. Your solution may be to focus on common ground—what you know of their past history in terms of contracting services or buying products from your company. What can you tell from their historical purchases? If your research shows that they place a high value on saving time, you can focus your presentation on the time-saving aspects of your new product and leave the technical terms to the user's manual.

Jargon is an occupation-specific language used by people in a given profession. Jargon does not necessarily imply formal education, but instead focuses on the language people in a profession use to communicate with each other. Members of the information technology department have a distinct group of terms that refer to common aspects in their field. Members of the marketing department, or advertising, or engineering, research, and development also have sets of terms they use within their professional community. Jargon exists in just about every occupation, independent of how much formal education is involved—from medicine and law; to financial services, banking, and insurance; to animal husbandry, auto repair, and the construction trades.

Whether or not to use jargon is often a judgment call, and one that is easier to make in speaking than in writing. In an oral context, we may be able to use a technical term and instantly know from feedback whether or not the receiver of the message "got it." If they didn't, we can define it on the spot. In written language, we lack that immediate response and must attend more to the context of receiver. The more we learn about our audience, the better we can tailor our chosen words. If we lack information or want our document to be understood by a variety of readers, it pays to use common words and avoid jargon.

Slang

Think for a moment about the words and expressions you use when you communicate with your best friends. If a coworker was to hang out with you and your friends, would they understand all the words you use, the music you listen to, the stories you tell and the way you tell them? Probably not, because you and your friends probably use certain words and expressions in ways that have special meaning to you.

This special form of language, which in some ways resembles jargon, is slang. Slang is the use of existing or newly invented words to take the place of standard or traditional words with the intent of adding an unconventional, nonstandard, humorous, or rebellious effect. It differs from jargon in that it is used in informal contexts, among friends or members of a certain age group, rather than by professionals in a certain industry.

If you say something is "phat," you may mean "cool," which is now a commonly understood slang word, but your coworker may not know this. As word "phat" moves into the mainstream, it will be replaced and adapted by the communities that use it.

Since our emphasis in business communication is on clarity, and a slang word runs the risk of creating misinterpretation, it is generally best to avoid slang. You may see the marketing department use a slang word to target a specific, well-researched audience, but for our purposes of your general presentation introducing a product or service, we will stick to clear, common words that are easily understood.

Sexist and Racist Language

Some forms of slang involve put-downs of people belonging to various groups. This type of slang often crosses the line and becomes offensive, not only to the groups that are being put down, but also to others who may hear it. In today's workplace there is no place where sexist or racist language is appropriate. In fact, using such language can be a violation of company policies and in some cases antidiscrimination laws.

Sexist language uses gender as a discriminating factor. Referring to adult women as "girls" or using the word "man" to refer to humankind are examples of sexist language. In a more blatant example, several decades ago a woman was the first female sales representative in her company's sales force. The men resented her and were certain they could outsell her, so they held a "Beat the Broad" sales contest. (By the way, she won.) Today, a contest with a name like that would be out of the question.

Racist language discriminates against members of a given race or ethnic group. While it may be obvious that racial and ethnic slurs have no place in business communication, there can also be issues with more subtle references to "*those* people" or "you know how *they* are." If race or ethnicity genuinely enters into the subject of your communication—in a drugstore, for example, there is often an aisle for black hair care products—then naturally it makes sense to mention customers belonging to that group. The key is that mentioning racial and ethnic groups should be done with the same respect you would desire if someone else were referring to groups you belong to.

Euphemisms

In seeking to avoid offensive slang, it is important not to assume that a euphemism is the solution. A euphemism involves substituting an acceptable word for an offensive, controversial, or unacceptable one that conveys the same or similar meaning. The problem is that the audience still knows what the expression means, and understands that the writer or speaker is choosing a euphemism for the purpose of sounding more educated or genteel.

Euphemisms can also be used sarcastically or humorously—"H-E-double-hockey-sticks," for example, is a euphemism for "hell" that may be amusing in some contexts. If your friend has just gotten a new job as a janitor, you may jokingly ask, "How's my favorite sanitation engineer this morning?" But such humor is not always appreciated, and can convey disrespect even when none is intended.

Euphemistic words are not always disrespectful, however. For example, when referring to a death, it is considered polite in many parts of the United States to say that the person "passed" or "passed away," rather than the relatively insensitive word, "died." Similarly, people say, "I need to find a bathroom" when it is well understood they are not planning to take a bath.

Still, these polite euphemisms are exceptions to the rule. Euphemisms are generally more of a hindrance than a help to understanding. In business communication the goal is clarity, and the very purpose of euphemism is to be vague. To be clear, choose words that mean what you intend to convey.

Doublespeak

Doublespeak is the deliberate use of words to disguise, obscure, or change meaning. Doublespeak is often present in bureaucratic communication, where it can serve to cast a person or an organization in a less unfavorable light than plain language would do.

When you ask a friend, "How does it feel to be downsized?" you are using a euphemism to convey humor, possibly even dark humor. Your friend's employer was likely not joking, though, when the action was announced as a "downsizing" rather than as a "layoff" or "dismissal." In military communications, "collateral damage" is often used to refer to civilian deaths, but no mention of the dead is present. You may recall the "bailout" of the U.S. economy in 2008, which quickly came to be called the "rescue" and finally the "buy in" as the United States bought interests in nine regional and national banks. The meaning changed from saving an economic system or its institutions to investing in them. This change of terms, and the attempt to change the meaning of the actions, became common in comedy routines across the nation.

Doublespeak can be quite dangerous when it is used deliberately to obscure meaning and the listener cannot anticipate or predict consequences based on the (in)effective communication. When a medical insurance company says, "We insure companies with up to twenty thousand lives," is it possible to forget that those "lives" are people? Ethical issues quickly arise when humans are dehumanized and referred to as "objects" or "subjects." When genocide is referred to as "ethnic cleansing," is it any less deadly than when called by its true name?

If the meaning was successfully hidden from the audience, one might argue that the doublespeak was in fact effective. But our goal continues to be clear and concise communication with a minimum of misinterpretation. Learn to recognize doublespeak by what it does not communicate as well as what it communicates.

Each of these six barriers to communication contributes to misunderstanding and miscommunication, intentionally or unintentionally. If you recognize one of them, you can address it right away. You can redirect a question and get to essential meaning, rather than leaving with a misunderstanding that impacts the relationship. In business communication, our goal of clear and concise communication remains constant, but we can never forget that trust is the foundation for effective communication. Part of our effort must include reinforcing the relationship inherent between source and receiver, and one effective step toward that goal is to reduce obstacles to effective communication.

Key Takeaway

To avoid obstacles to communication, avoid clichés, jargon, slang, sexist and racist language, euphemisms, and doublespeak.

Exercises

1. Identify at least five common clichés and look up their origins. Try to understand how and when each phrase became a cliché. Share your findings with your classmates.
2. Using your library's microfilm files or an online database, look through newspaper articles from the 1950s or earlier. Find at least one article that uses sexist or racist language. What makes it racist or sexist? How would a journalist convey the same information today? Share your findings with your class.
3. Identify one slang term and one euphemism you know is used in your community, among your friends, or where you work. Share and compare with classmates.
4. How does language change over time? Interview someone older than you and someone younger than you and identify words that have changed. Pay special attention to jargon and slang words.
5. Is there ever a justifiable use for doublespeak? Why or why not? Explain your response and give some examples.
6. Can people readily identify the barriers to communication? Survey ten individuals and see if they accurately identify at least one barrier, even if they use a different term or word.

References

Washburn, S. (2008, February). The miscommunication gap. *ESI Horizons*, *9*(2). Retrieved from www.esi-intl.com/public/Library/html/200802HorizonsArticle1.asp?UnityID=8522516.1290.

2.1.5: Emphasis Strategies

Learning Objectives

1. Describe and define four strategies that can give emphasis to your message.
2. Demonstrate the effective use of visuals in an oral or written presentation.
3. Demonstrate the effective use of signposts, internal summaries and foreshadowing, and repetition in an oral or written presentation.

One key to communication is capturing and holding the audience's attention. No one likes to be bored, and no communicator likes to send boring messages. To keep your communications dynamic and interesting, it often helps to use specific strategies for emphasis. Let's examine some of these strategies and how to use them to strengthen your message.

Visual Communication

Adding the visual dimension to a document or speech can be an excellent way to hold your audience's interest and make your meaning clear. But be careful not to get carried away. Perhaps the most important rule to remember in using visuals is this: the visuals are to support your document or presentation, not to take the place of it. A picture may be worth a thousand words, but it is the words that really count. Make sure that your communication is researched, organized, and presented well enough to stand on its own. Whatever visuals you choose should be clearly associated with your verbal content, repeating, reinforcing, or extending the scope of your message.

Table $2.1.5.1$lists some common types of visuals and gives examples of their strategic uses.

Table $2.1.5.1$ Strategic Use of Visuals

Type	Purpose	Example(s)
Photograph, Video Clip, or Video Still	Show an actual person, event, or work of art.	 Figure 2.1.5.3: Historic photo of U.S. troops raising the flag on Iwo Jima. USMC Archives – Flag Raising on Iwo Jima – CC BY 2.0.

Video Trailer, Video Still Show the visual relationships among two or more things; a shape, a contrast in size, a process or how something works.

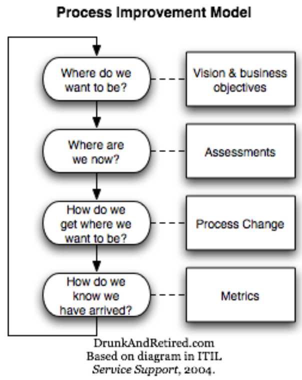

Figure 2.1.5.4: Michael Coté – Process Improvement Model – CC BY 2.0.

Bar Chart Show the amount of one or more variables at different time intervals.

Figure 2.1.5.5: Jason Tester Guerrilla Future – CC BY-ND 2.0.

Pie Chart Show the percentages of the whole occupied by various segments.

Figure 2.1.5.6: Chris Potter – 3D Budget Pie Chart – CC BY 2.0.

Line Graph Show the change in one or more variables progressively across time.

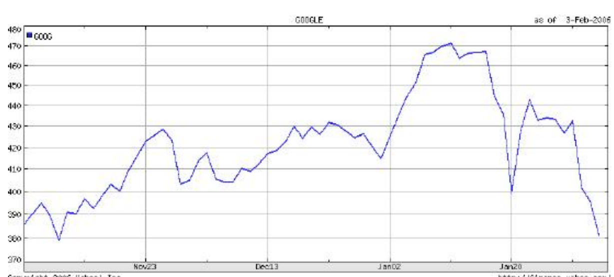

Figure 2.1.5.7: Michael Coté – GOOG at $381.55 – CC BY 2.0.

Actual Object Show the audience an item crucial to the discussion.

Figure 2.1.5.8: jessica wilson – masky – CC BY-NC-ND 2.0.

Body Motion Use your body as a visual to demonstrate an event.

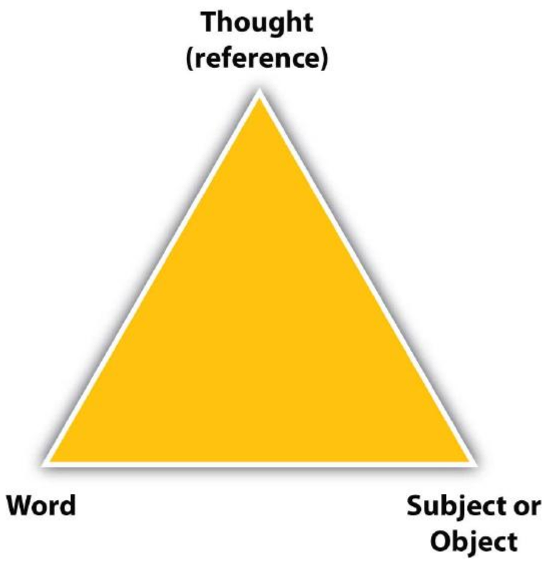

Figure 2.1.5.9: Sit in a chair, pretend to buckle up, look at the audience, pretend to drive, and then have a mock accident, turning your chair on its side.

Signposts

Signposts (or indicators), are key words that alert the audience to a change in topic, a tangential explanation, an example, or a conclusion. Readers and listeners can sometimes be lulled into "losing their place"—forgetting what point is being made or how far along in the discussion the writer or speaker has gotten. You can help your audience avoid this by signaling to them when a change is coming.

Common signposts include "on the one hand," "on the other hand," "the solution to this problem is," "the reason for this is," "for example," "to illustrate," and "in conclusion" or "in summary."

Internal Summaries and Foreshadowing

Like signposts, internal summaries and foreshadowing help the audience to keep track of where they are in the message. These strategies work by reviewing what has been covered and by highlighting what is coming next.

As a simple example, suppose you are writing or presenting information on how to assemble a home emergency preparedness kit. If you begin by stating that there are four main items needed for the kit, you are foreshadowing your message and helping your audience to watch or listen for four items. As you cover each of the items, you can say, "The first item," "The second item," "Now we've got X and Y in our kit; what else do we need? Our third item is," and so forth. These internal summaries help your audience keep track of progress as your message continues. (The four items, by the way, are water, nonperishable food, first aid supplies, and a dust mask.) (Federal Emergency Management Administration, 2009)

With this strategy, you reinforce relationships between points, examples, and ideas in your message. This can be an effective strategy to encourage selective retention of your content.

Repetition

Saying the same word over and over may not seem like an effective strategy, but when used artfully, repetition can be an effective way to drive home your meaning and help your audience retain it in their memory. Many of history's greatest speakers have used repetition in speeches that have stood the test of time. For example, British Prime Minister Winston Churchill gave a speech in 1940 that is remembered as his "We Shall Fight" speech; in it he repeats the phrase "we shall fight" no fewer than six times. Similarly, in his famous "I Have a Dream" speech, Martin Luther King Jr. repeated the phrases "I have a dream" and "let freedom ring" with unforgettable effect.

Another form of repetition is indirect repetition: finding alternative ways of saying the same point or idea. Suppose your main point was, "global warming is raising ocean levels." You might go on to offer several examples, citing the level in each of the major oceans and seas while showing them on a map. You might use photographs or video to illustrate the fact that beaches and entire islands are going underwater. Indirect repetition can underscore and support your points, helping them stand out in the memory of your audience.

Key Takeaway

Emphasize your message by using visuals, signposts, internal summaries and foreshadowing, and repetition.

Exercises

1. Find a news article online or in a newspaper or magazine that uses several visuals. What do the visuals illustrate? Would the article be equally effective without them? Why or why not? Share your findings with your class.
2. Find an article or listen to a presentation that uses signposts. Identify the signposts and explain how they help the audience follow the article or presentation. Share your findings with your class.
3. Find the legend on a map. Pick one symbol and describe its use. Share and compare with the class.

References

Federal Emergency Management Administration. (2009). Get a kit. Retrieved from http://www.ready.gov/america/getakit.

2.1.6: Improving Verbal Communication

Learning Objectives

- List and explain the use of six strategies for improving verbal communication.
- Demonstrate the appropriate use of definitions in an oral or written presentation.
- Understand how to assess the audience, choose an appropriate tone, and check for understanding and results in an oral or written presentation.

Throughout the chapter we have visited examples and stories that highlight the importance of verbal communication. To end the chapter, we need to consider how language can be used to enlighten or deceive, encourage or discourage, empower or destroy. By defining the terms we use and choosing precise words, we will maximize our audience's understanding of our message. In addition, it is important to consider the audience, control your tone, check for understanding, and focus on results. Recognizing the power of verbal communication is the first step to understanding its role and impact on the communication process.

Define Your Terms

Even when you are careful to craft your message clearly and concisely, not everyone will understand every word you say or write. As an effective business communicator, you know it is your responsibility to give your audience every advantage in understanding your meaning. Yet your presentation would fall flat if you tried to define each and every term—you would end up sounding like a dictionary.

The solution is to be aware of any words you are using that may be unfamiliar to your audience. When you identify an unfamiliar word, your first decision is whether to use it or to substitute a more common, easily understood word. If you choose to use the unfamiliar word, then you need to decide how to convey its meaning to those in your audience who are not familiar with it. You may do this in a variety of ways. The most obvious, of course, is to state the meaning directly or to rephrase the term in different words. But you may also convey the meaning in the process of making and supporting your points. Another way is to give examples to illustrate each concept, or use parallels from everyday life.

Overall, keep your audience in mind and imagine yourself in their place. This will help you to adjust your writing level and style to their needs, maximizing the likelihood that your message will be understood.

Choose Precise Words

To increase understanding, choose precise words that paint as vivid and accurate a mental picture as possible for your audience. If you use language that is vague or abstract, your meaning may be lost or misinterpreted. Your document or presentation will also be less dynamic and interesting than it could be.

Table $2.1.6.2$ lists some examples of phrases that are imprecise and precise. Which one evokes a more dynamic image in your imagination?

Table $2.1.6.1$: Precisely What Are You Saying?

The famous writer William Safire died in 2009; he was over seventy.	The former Nixon speech writer, language authority, and *New York Times* columnist William Safire died of pancreatic cancer in 2009; he was seventy-nine.
Clumber spaniels are large dogs.	The Clumber Spaniel Club of America describes the breed as a "long, low, substantial dog," standing 17 to 20 inches high and weighing 55 to 80 pounds.
It is important to eat a healthy diet during pregnancy.	Eating a diet rich in whole grains, fruits and vegetables, lean meats, low-fat dairy products can improve your health during pregnancy and boost your chances of having a healthy baby.
We are making good progress on the project.	In the two weeks since inception, our four-member team has achieved three of the six objectives we identified for project completion; we are on track to complete the project in another three to four weeks.
For the same amount spent, we expected more value added.	We have examined several proposals in the $10,000 range, and they all offer more features than what we see in the $12,500 system ABC Corp. is offering.

Officers were called to the scene.	Responding to a 911 call, State Police Officers Arellano and Chavez sped to the intersection of County Route 53 and State Highway 21.
The victim went down the street.	The victim ran screaming to the home of a neighbor, Mary Lee of 31 Orchard Street.
Several different colorways are available.	The silk jacquard fabric is available in ivory, moss, cinnamon, and topaz colorways.
This smartphone has more applications than customers can imagine.	At last count, the BlackBerry Tempest has more than 500 applications, many costing 99 cents or less; users can get real-time sports scores, upload videos to TwitVid, browse commuter train schedules, edit e-mails before forwarding, and find recipes—but so far, it doesn't do the cooking for you.
A woman was heckled when she spoke at a health care event.	On August 25, 2009, Rep. Frank Pallone (Democrat of New Jersey's 6th congressional district) hosted a "town hall" meeting on health care reform where many audience members heckled and booed a woman in a wheelchair as she spoke about the need for affordable health insurance and her fears that she might lose her home.

Consider Your Audience

In addition to precise words and clear definitions, contextual clues are important to guide your audience as they read. If you are speaking to a general audience and choose to use a word in professional jargon that may be understood by many—but not all—of the people in your audience, follow it by a common reference that clearly relates its essential meaning. With this positive strategy you will be able to forge relationships with audience members from diverse backgrounds. Internal summaries tell us what we've heard and forecast what is to come. It's not just the words, but also how people hear them that counts.

If you say the magic words "in conclusion," you set in motion a set of expectations that you are about to wrap it up. If, however, you introduce a new point and continue to speak, the audience will perceive an expectancy violation and hold you accountable. You said the magic words but didn't honor them. One of the best ways to display respect for your audience is to not exceed the expected time in a presentation or length in a document. Your careful attention to contextual clues will demonstrate that you are clearly considering your audience.

Take Control of Your Tone

Does your writing or speech sound pleasant and agreeable? Simple or sophisticated? Or does it come across as stuffy, formal, bloated, ironic, sarcastic, flowery, rude, or inconsiderate? Recognizing our own tone is not always easy, as we tend to read or listen from our own viewpoint and make allowances accordingly.

Once we have characterized our tone, we need to decide whether and how it can be improved. Getting a handle on how to influence tone and to make your voice match your intentions takes time and skill.

One useful tip is to read your document out loud before you deliver it, just as you would practice a speech before you present it to an audience. Sometimes hearing your own words can reveal their tone, helping you decide whether it is correct or appropriate for the situation.

Another way is to listen or watch others' presentations that have been described with terms associated with tone. Martin Luther King Jr. had one style while President Barack Obama has another. The writing in *The Atlantic* is far more sophisticated than the simpler writing in *USA Today*, yet both are very successful with their respective audiences. What kind of tone is best for your intended audience?

Finally, seek out and be receptive to feedback from teachers, classmates, and coworkers. Don't just take the word of one critic, but if several critics point to a speech as an example of pompous eloquence, and you don't want to come across in your presentation as pompous, you may learn from that example speech what to avoid.

Check for Understanding

When we talk to each other face-to-face, seeing if someone understood you isn't all that difficult. Even if they really didn't get it, you can see, ask questions, and clarify right away. That gives oral communication, particularly live interaction, a distinct advantage. Use this immediacy for feedback to your advantage. Make time for feedback and plan for it. Ask clarifying questions.

Share your presentation with more than one person, and choose people that have similar characteristics to your anticipated audience.

If you were going to present to a group that you knew in advance was of a certain age, sex, or professional background, it would only make sense to connect with someone from that group prior to your actual performance to check and see if what you have created and what they expect are similar. In oral communication, feedback is core component of the communication model and we can often see it, hear it, and it takes less effort to assess it.

Be Results Oriented

At the end of the day, the assignment has to be complete. It can be a challenge to balance the need for attention to detail with the need to arrive at the end product—and its due date. Stephen Covey suggests beginning with the end in mind as one strategy for success. If you have done your preparation, know your assignment goals, desired results, have learned about your audience and tailored the message to their expectations, then you are well on your way to completing the task. No document or presentation is perfect, but the goal itself is worthy of your continued effort for improvement.

Here the key is to know when further revision will not benefit the presentation and to shift the focus to test marketing, asking for feedback, or simply sharing it with a mentor or coworker for a quick review. Finding balance while engaging in an activity that requires a high level of attention to detail can be challenge for any business communicator, but it is helpful to keep the end in mind.

Key Takeaway

To improve communication, define your terms, choose precise words, consider your audience, control your tone, check for understanding, and aim for results.

Exercises

1. Choose a piece of writing from a profession you are unfamiliar with. For example, if you are studying biology, choose an excerpt from a book on fashion design. Identify several terms you are unfamiliar with, terms that may be considered jargon. How does the writer help you understand the meaning of these terms? Could the writer make them easier to understand? Share your findings with your class.
2. In your chosen career field or your college major, identify ten jargon words, define them, and share them with the class.
3. Describe a simple process, from brushing your teeth to opening the top of a bottle, in as precise terms as possible. Present to the class.

References

- Covey, S. (1989). *The seven habits of highly effective people*. New York, NY: Simon & Schuster.

2.1.7: Additional Resources

Benjamin Lee Whorf was one of the twentieth century's foremost linguists. Learn more about his theories of speech behavior by visiting this site. https://en.Wikipedia.org/wiki/Benjamin_Lee_Whorf

Visit Infoplease to learn more about the eminent linguist (and U.S. senator) S. I. Hayakawa. http://www.infoplease.com/ipa/A0880739.html

Harvard psychology professor Steven Pinker is one of today's most innovative authorities on language. Explore reviews of books about language Pinker has published. stevenpinker.com/taxonomy/term/4265

Reference.com offers a wealth of definitions, synonym finders, and other guides to choosing the right words. http://dictionary.reference.com

Visit Goodreads and learn about one of the best word usage guides, Bryan Garner's *Modern American Usage*. http://www.goodreads.com/book/show/344643.Garner_s_Modern_American_Usage

Visit Goodreads and learn about one of the most widely used style manuals, *The Chicago Manual of Style*. http://www.goodreads.com/book/show/103362.The_Chicago_Manual_of_Style

For in-depth information on how to present visuals effectively, visit the Web site of Edward Tufte, a Professor Emeritus at Yale University, where he taught courses in statistical evidence, information design, and interface design. http://www.edwardtufte.com/tufte/index

The "I Have a Dream" speech by Martin Luther King Jr. is one of the most famous speeches of all time. View it on video and read the text. http://www.americanrhetoric.com/speeches/mlkihaveadream.htm

The Religious Communication Association, an interfaith organization, seeks to promote honest, respectful dialogue reflecting diversity of religious beliefs. www.relcomm.org/

To learn more about being results oriented, visit the Web site of Stephen Covey, author of the best seller *The Seven Habits of Highly Effective People*. www.stephencovey.com

SECTION OVERVIEW

2.2: Understanding Your Audience

Thumbnail: pixabay.com/photos/workplace...eting-1245776/

2.2.1: Self-Understanding is Fundamental to Communication

Learning Objectives

1. Describe the factors that contribute to self-concept.
2. Describe how the self-fulfilling prophecy works.

In the first of the Note 3.1 “Introductory Exercises” for this chapter, you listed terms to describe yourself. This exercise focuses on your knowledge, skills, experience, interests, and relationships. Your sense of self comes through in your oral and written presentations. Public communication starts with intrapersonal communication, or communication with yourself. You need to know what you want to say before you can say it to an audience.

Understanding your perspective can lend insight to your awareness, the ability to be conscious of events and stimuli. Awareness determines what you pay attention to, how you carry out your intentions, and what you remember of your activities and experiences each day. Awareness is a complicated and fascinating area of study. The way we take in information, give it order, and assign it meaning has long interested researchers from disciplines including sociology, anthropology, and psychology.

Your perspective is a major factor in this dynamic process. Whether you are aware of it or not, you bring to the act of reading this sentence a frame of mind formed from experiences and education across your lifetime. Imagine that you see a presentation about snorkeling in beautiful Hawaii as part of a travel campaign. If you have never been snorkeling but love to swim, how will your perspective lead you to pay attention to the presentation? If, however, you had a traumatic experience as a child in a pool and are now afraid of being under water, how will your perspective influence your reaction?

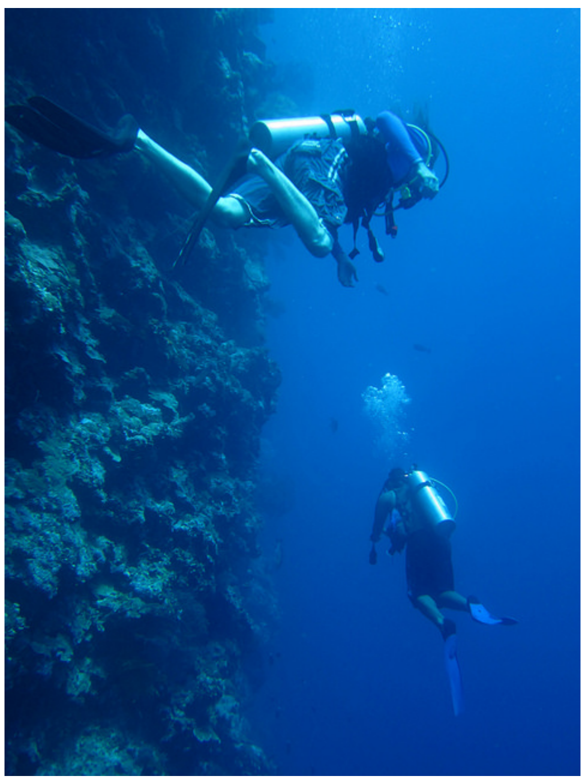

Figure 2.2.1.1: Peaceful or dangerous? Your perception influences your response. sandwich – bryan and jason, diving a wall – CC BY-NC-ND 2.0.

Learning to recognize how your perspective influences your thoughts is a key step in understanding yourself and preparing to communicate with others.

The communication process itself is the foundation for oral and written communication. Whether we express ourselves in terms of a live, face-to-face conversation or across a voice over Internet protocol (VoIP) chat via audio and visual channels, emoticons (:)), and abbreviations (IMHO [In My Humble Opinion]), the communication process remains the same. Imagine that you are at work and your Skype program makes the familiar noise indicating that someone wants to talk. Your caller ID tells you that it is a friend.

You also know that you have the report right in front of you to get done before 5:00 p.m. Your friend is quite a talker, and for him everything tends to have a "gotta talk about it right now" sense of urgency. You know a little bit about your potential audience or conversational partner. Do you take the call? Perhaps you chat back "Busy, after 5," only to have him call again. You interpret the ring as his insistent need for attention, but you have priorities. You can choose to close the Skype program, stop the ringing, and get on with your report, but do you? Communication occurs on many levels in several ways.

Self-Concept

When we communicate, we are full of expectations, doubts, fears, and hopes. Where we place emphasis, what we focus on, and how we view our potential has a direct impact on our communication interactions. You gather a sense of self as you grow, age, and experience others and the world. At various times in your life, you have probably been praised for some of your abilities and talents, and criticized for doing some things poorly. These compliments and criticisms probably had a deep impact on you. Much of what we know about ourselves we've learned through interaction with others. Not everyone has had positive influences in their lives, and not every critic knows what they are talking about, but criticism and praise still influence how and what we expect from ourselves.

Carol Dweck, a psychology researcher at Stanford University, states that "something that seems like a small intervention can have cascading effects on things we think of as stable or fixed, including extroversion, openness to new experience, and resilience." (Begley, 2008) Your personality and expressions of it, like oral and written communication, were long thought to have a genetic component. But, says Dweck, "More and more research is suggesting that, far from being simply encoded in the genes, much of personality is a flexible and dynamic thing that changes over the life span and is shaped by experience." (Begley, 2008) If you were told by someone that you were not a good speaker, know this: You can change. You can shape your performance through experience, and a business communication course, a mentor at work, or even reading effective business communication authors can result in positive change.

Attitudes, Beliefs, and Values

When you consider what makes you *you*, the answers multiply as do the questions. As a baby, you learned to recognize that the face in the mirror was your face. But as an adult, you begin to wonder what and who you are. While we could discuss the concept of self endlessly and philosophers have wrestled and will continue to wrestle with it, for our purposes, let's focus on self, which is defined as one's own sense of individuality, motivations, and personal characteristics (McLean, 2003). We also must keep in mind that this concept is not fixed or absolute; instead it changes as we grow and change across our lifetimes.

One point of discussion useful for our study about ourselves as communicators is to examine our attitudes, beliefs, and values. These are all interrelated, and researchers have varying theories as to which comes first and which springs from another. We learn our values, beliefs, and attitudes through interaction with others. Table $2.2.1.1$ defines these terms and provides an example of each.

Table 2.2.1.1 Attitudes, Beliefs, and Values

	Definition	Changeable?	Example
Attitudes	Learned predispositions to a concept or object	Subject to change	I enjoyed the writing exercise in class today.
Beliefs	Convictions or expressions of confidence	Can change over time	This course is important because I may use the communication skills I am learning in my career.
Values	Ideals that guide our behavior	Generally long lasting	Effective communication is important.

An attitude is your immediate disposition toward a concept or an object. Attitudes can change easily and frequently. You may prefer vanilla while someone else prefers peppermint, but if someone tries to persuade you of how delicious peppermint is, you may be willing to try it and find that you like it better than vanilla.

Beliefs are ideas based on our previous experiences and convictions and may not necessarily be based on logic or fact. You no doubt have beliefs on political, economic, and religious issues. These beliefs may not have been formed through rigorous study, but you nevertheless hold them as important aspects of self. Beliefs often serve as a frame of reference through which we interpret our world. Although they can be changed, it often takes time or strong evidence to persuade someone to change a belief.

Values are core concepts and ideas of what we consider good or bad, right or wrong, or what is worth the sacrifice. Our values are central to our self-image, what makes us who we are. Like beliefs, our values may not be based on empirical research or rational thinking, but they are even more resistant to change than are beliefs. To undergo a change in values, a person may need to undergo a transformative life experience.

For example, suppose you highly value the freedom to make personal decisions, including the freedom to choose whether or not to wear a helmet while driving a motorcycle. This value of individual choice is central to your way of thinking and you are unlikely to change this value. However, if your brother was driving a motorcycle without a helmet and suffered an accident that fractured his skull and left him with permanent brain damage, you might reconsider this value. While you might still value freedom of choice in many areas of life, you might become an advocate for helmet laws—and perhaps also for other forms of highway safety, such as stiffer penalties for cell-phone talking and texting while driving.

Self-Image and Self-Esteem

Your self-concept is composed of two main elements: self-image and self-esteem.

Your self-image is how you see yourself, how you would describe yourself to others. It includes your physical characteristics—your eye color, hair length, height, and so forth. It also includes your knowledge, experience, interests, and relationships. If these sound familiar, go back and look at the first of the Note 3.1 "Introductory Exercises" for this chapter. In creating the personal inventory in this exercise, you identified many characteristics that contribute to your self-image. In addition, image involves not just how you look but also your expectations of yourself—what you can be.

What is your image of yourself as a communicator? How do you feel about your ability to communicate? While the two responses may be similar, they indicate different things. Your self-esteem is how you feel about yourself; your feelings of self-worth, self-acceptance, and self-respect. Healthy self-esteem can be particularly important when you experience a setback or a failure. Instead of blaming yourself or thinking, "I'm just no good," high self-esteem will enable you to persevere and give yourself positive messages like "If I prepare well and try harder, I can do better next time."

Putting your self-image and self-esteem together yields your self-concept: your central identity and set of beliefs about who you are and what you are capable of accomplishing. When it comes to communicating, your self-concept can play an important part. You may find that communicating is a struggle, or the thought of communicating may make you feel talented and successful. Either way, if you view yourself as someone capable of learning new skills and improving as you go, you will have an easier time learning to be an effective communicator. Whether positive or negative, your self-concept influences your performance and the expression of that essential ability: communication.

Looking-Glass Self

In addition to how we view ourselves and feel about ourselves, of course, we often take into consideration the opinions and behavior of others. Charles Cooley's looking-glass self reinforces how we look to others and how they view us, treat us, and interact with us to gain insight of our identity. We place an extra emphasis on parents, supervisors, and on those who have some degree of control over us when we look at others. Developing a sense of self as a communicator involves balance between constructive feedback from others and constructive self-affirmation. You judge yourself, as others do, and both views count.

Self-Fulfilling Prophecy

Now, suppose that you are treated in an especially encouraging manner in one of your classes. Imagine that you have an instructor who continually "catches you doing something right" and praises you for your efforts and achievements. Would you be likely to do well in this class and perhaps go on to take more advanced courses in this subject?

In a psychology experiment that has become famous through repeated trials, several public school teachers were told that specific students in their classes were expected to do quite well because of their intelligence (Rosenthal & Jacobson, 1968). These students were identified as having special potential that had not yet "bloomed." What the teachers didn't know was that these "special potential" students were randomly selected. That's right: as a group, they had no more special potential than any other students.

Can you anticipate the outcome? As you may guess, the students lived up to their teachers' level of expectation. Even though the teachers were supposed to give appropriate attention and encouragement to all students, in fact they unconsciously communicated special encouragement verbally and nonverbally to the special potential students. And these students, who were actually no more gifted than their peers, showed significant improvement by the end of the school year. This phenomenon came to be called the "Pygmalion effect" after the myth of a Greek sculptor named Pygmalion, who carved a marble statue of a woman so lifelike that he fell in love with her—and in response to his love she did in fact come to life and marry him (Rosenthal & Jacobson, 1968; Insel & Jacobson, 1975).

In more recent studies, researchers have observed that the opposite effect can also happen: when students are seen as lacking potential, teachers tend to discourage them or, at a minimum, fail to give them adequate encouragement. As a result, the students do poorly (Schugurensky, 2009; Anyon, 1980; Oakes, 1985; Sadker & Sadker, 1994).

When people encourage you, it affects the way you see yourself and your potential. Seek encouragement for your writing and speaking. Actively choose positive reinforcement as you develop your communication skills. You will make mistakes, but the important thing is to learn from them. Keep in mind that criticism should be constructive, with specific points you can address, correct, and improve.

The concept of a self-fulfilling prophecy, in which someone's behavior comes to match and mirror others' expectations, is not new. Robert Rosenthal, a professor of social psychology at Harvard, has observed four principles while studying this interaction between expectations and performance:

1. We form certain expectations of people or events.
2. We communicate those expectations with various cues, verbal and nonverbal.
3. People tend to respond to these cues by adjusting their behavior to match the expectations.
4. The outcome is that the original expectation becomes true.

Key Takeaway

You can become a more effective communicator by understanding yourself and how others view you: your attitudes, beliefs, and values; your self-concept; and how the self-fulfilling prophecy may influence your decisions.

Exercises

1. How would you describe yourself as a public speaker? Now, five, and ten years ago? Is your description the same or does it change across time? This business communication text and course can make a difference in what you might write for the category "one year from today."
2. How does your self-concept influence your writing? Write a one- to two-page essay on this topic and discuss it with a classmate.
3. Make a list of at least three of your strongly held beliefs. What are those beliefs based on? List some facts, respected authorities, or other evidence that support them. Share your results with your class.
4. What are some of the values held by people you know? Identify a target sample size (twenty is a good number) and ask members of your family, friends, and peers about their values. Compare your results with those of your classmates.
5. Make a list of traits you share with your family members. Interview them and see if anyone else in your family has shared them. Share and compare with your classmates.
6. What does the field of psychology offer concerning the self-fulfilling prophecy? Investigate the topic and share your findings.

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2.2.2: Perception

Learning Objectives

1. Describe the concept of perception.
2. Describe the process of selection and the factors that influence it.
3. Describe several principles of organization.
4. Explain how interpretation influences our perceptions.

Look at the fourth of the Note 3.1 “Introductory Exercises” for this chapter. If you deciphered the hidden message, how did you do it? You may have tried looking for words that were diagonal or backwards, using skills you learned solving similar puzzles in the past. While there are many ways to solve this puzzle, there is only one right answer (McLean, 2003). Reading from right to left (not left to right), and bottom to top (not top to bottom), the hidden message reads: *Your perspective influences how you perceive your world*.

Where did you start reading on this page? The top left corner. Why not the bottom right corner, or the top right one? In English we read left to right, from the top of the page to the bottom. But not everyone reads the same. If you read and write Arabic or Hebrew, you will proceed from right to left. Neither is right or wrong, simply different. You may find it hard to drive on the *other* side of the road while visiting England, but for people in the United Kingdom, it is normal and natural.

We can extend this concept in many ways. Imagine that you are doing a sales presentation to a group where the average age is much older or younger than you. In terms of words to use to communicate ideas, references to music or movies, even expectations for behaviors when dating, their mental “road map” may be quite different from yours. Even though your sales message might focus on a product like a car, or a service like car washing, preconceived ideas about both will need to be addressed.

For example, how many advertisements have you seen on television that have a song from specific time period, like the 1980s, or perhaps the 1960s? The music is a clear example of targeting a specific audience with something distinctive, like a familiar song. When speaking or writing, your style, tone, and word choice all influence the reader. The degree to which you can tailor your message to their needs will be associated with an increase in the overall effectiveness of your message. These differences in perspective influence communication and your ability to recognize not only your point of view but theirs will help you become “other-oriented” and improve communication.

Look at the puzzle again and see if you can *avoid* seeing the solution. It’ll be hard because now that you know where it is, you have a mental road map that leads you to the solution. The mental state where you could not see it, or perceive it, is gone. Your audience has a mental road map that includes values, experiences, beliefs, strategies to deal with challenges, even scripts for behavioral expectations. You need to read the maps as closely as possibly in order to be able to communicate from common ground.

This discussion illustrates what the German philosopher Jürgen Habermas calls preunderstanding, a set of expectations and assumptions from previous experience that we apply to a new problem or situation. We draw from our experiences to help guide us to our goal, even when the situations may be completely different. We “understand” before we experience because we predict or apply our mental template to what we think is coming.

Expectations affect our perceptions. If the teacher says, “I need to see you after class” your perception might involve thoughts like, “What have I done? Why me? What does he or she want?” and you may even think back to other times in similar situations. This may contribute to a negative perception of the meeting, and then you might be surprised to learn the teacher only wanted to tell you about a scholarship opportunity. The same idea applies to your audience. They will have certain expectations of you as a speaker.

“The customary forms and configurations (of communication) that members expect” are called conventions (Kostelnick, 1998). You’ve probably heard the terms “conventional,” perhaps in relation to a “conventional oven.” This use means a standard type oven with a heat source as opposed a microwave oven. Who decided that a stove, for example, would have burners on top and a front-opening door to the oven? Why four burners and not three, or two? Many modern stoves have ceramic burners that are integrated in to the top of the oven, or even into the top of a counter, separate from the oven. These new applications “stretch” the notion of what is the standard for a stove.

People use conventions to guide them every day. On which side of the plate will you find the spoon? In a formal place setting, the answer is “right.” If, however, you are at a potluck supper, you may be handed a plate with all your utensils, including the spoon, just sitting on top. Or you might find a pile of spoons next to the plates and have to get one for yourself. In each case there are a set of conventions in place that we use to guide behavior and establish expectations. At a formal dinner, eating with your fingers might be unconventional or even rude. The same actions at a potluck might be the dominant convention, as in everyone is doing it.

In business communication, conventions are always in place. The audience will have a set of expectations you need to consider, and you need to keep an open mind about the importance of those expectations; but you also need to achieve your goal of informing, persuading, or motivating them. If you are presenting a sales message and the results are zero sales, you'll have to take a long look at what you presented and develop alternative strategies. Providing a different perspective to your audience while adapting to their expectations and finding common ground is a good first step in gaining and maintaining their attention.

We often make assumptions about what others are communicating and connect the dots in ways that were not intended by the speaker. As a business communicator, your goal is to help the audience connect the dots in the way you intend while limiting alternative solutions that may confuse and divide the audience.

Taking care to make sure you understand before connecting your dots and creating false expectations is a positive way to prepare yourself for the writing process. Do you know what the assignment is? Are the goals and results clear? Do you know your audience? All these points reinforce the central theme that clear and concise communication is critical in business and industry.

Selection

Can you imagine what life would be like if you heard, saw, and felt every stimulus or activity in your environment all day long? It would be overwhelming. It is impossible to perceive, remember, process, and respond to every action, smell, sound, picture, or word that we see, hear, small, taste, or touch. We would be lost paying attention to everything, being distracted by everything, and lack focus on anything.

In the same way, a cluttered message, with no clear format or way of discerning where the important information is located, can overwhelm the listener. It is handy, therefore, that we as humans can choose to pay attention to a specific stimulus while ignoring or tuning out others. This raises the question, however, of why we choose to pay attention to one thing over another. Since we cannot pay attention to everything at once, we choose to pay attention to what appears to be the most relevant for us.

This action of sorting competing messages, or choosing stimuli, is called selection. Selection is one very important part of perception and awareness. You select what to pay attention to based on what is important to you, or what you value, and that is different for each person. Let's pretend you're reading an article for class, or perhaps you're not as much reading but skimming or half-listening to the author's voice in your head, and only following along enough to get the main idea, as you do when you scan rather than read something word for word.

At the same time you are thinking about the attractive classmate who sits in the third row, wondering when it will be noon, and starting to think about what to eat for lunch. In this real-world example, we can quickly count the four stimuli you've selected to pay attention to, but not all of them receive equal attention at every moment. Perhaps your stomach starts to growl; while the mental image of the attractive classmate is indeed attractive, your stomach demands the center stage of your attention.

A stage is a useful way to think about your focus or attention. There are times when you see everything on the stage, the literal stage in terms of theater or the page you are reading now, in print or online. The stage refers to the setting, scene, and context of the communication interaction, and can be equally applied to written or oral communication. This page can be a stage, where objects, symbols, and words are placed to guide your attention in the same way an actor striding across a theater stage will compel you.

You may perceive everything happening at once—while your attention is divided, you still have a larger perspective. Suppose you have just come home from work and are standing by your kitchen table opening the day's mail. At the same time, you are planning what to cook for dinner and trying to get your dog leashed up to take a quick walk outside. You open a letter in a preprinted envelope whose return address is unfamiliar. The relationships between the words or characters are readily apparent. With one glance you can see that the letter is an introduction letter with a sales message, you assess that it doesn't interest you, and into the round file (garbage can) it goes.

If you were the author of that letter, you might be quite disappointed. How do you grasp a reader's attention? Part of the solution lies in your ability to help the reader select the key point or bit of information that will lead to "what else?" instead of "no, thanks."

The same lesson applies to public speaking, but the cues will be distinct. The audience won't throw you into the round file, but mentally they may ignore you and start planning what's for dinner, tuning you out. They may fidget, avoid eye contact, or even get up and walk out—all signs that your sales message was not well received.

There are other times where you are so focused on one character or part of the stage that you miss something going on the other side. In the same way, as you sit in your late-morning class and focus on your growling stomach, the instructor's voice becomes less of a focus until you hear laughter from your classmates. You look up to see and hear a friend say, "We can clearly see the power and the importance of nutrition and its impact on attention span," as he or she gestures in your direction. You notice that everyone is looking back at you and realize they too heard your stomach. Your focus and attention are important and constantly challenged.

As we follow the bouncing ball of attention, we see how selection involves focusing on one stimulus while limiting our attention on another, or ignoring it altogether. We do this as a matter of course.

The process of selection and ignoring has been discussed in both contexts of a learned behavior as well as something we are born with, as in instinct or preprogrammed behavioral patterns. Regardless of whether this process is instinctive or learned, we can easily see from the previous example how the speaker, to a degree, competes with internal and external stimuli.

Internal stimuli are those that arise from within one's self, such as being hungry. External stimuli involve stimulation from outside one's self, such as the image of the attractive classmate or the sound of the instructor's voice. As a communicator, your awareness of both of these sources of stimuli will help you recognize the importance or preparation, practice, and persistence as you prepare your message with them in mind. How will you help guide the audience's thoughts about your topic? How will you build attention-getting features throughout your written work? How will you address issues like sleepiness when you cannot change the designated time of your speech, scheduled right after lunch? All these issues relate to the selection process, and to a degree the speaker can influence the perception of both internal and external stimuli.

Selection has three main parts: exposure, attention, and retention (Klopf, 1995). Selective exposure is both information we choose to pay attention to and information that we choose to ignore, or that is unavailable to us. For example, in a class you may have been required to view a student-created YouTube video presentation on which is better for you, Gatorade or water. As your levels of exposure to stimuli influence your decisions, you may think, "Oh, I've heard this before," and tune the speaker out. Selective attention involves focusing on one stimulus, like the image of an attractive classmate, and tuning out a competing stimulus, like the instructor's voice. Selective retention involves choosing to remember one stimulus over another.

You may be out walking and spot a friend from the same class. Your friend may say, "The program we had to watch for class said Gatorade has trans fat in it. Do you think that's true?" and you may be at a loss, having no memory of hearing any such thing because, while you were present in your room, you were paying attention to other stimuli. Furthermore, you may not be a nutrition major like your friend so that the term "trans fat" may not mean anything to you. To someone majoring in nutrition, it might be a common term used across their classes, but if you are an accounting major, you may not be familiar with the term. This illustrates how one aspect of selection, like exposure, can influence another aspect, like retention.

You might then think to yourself that the point in which you tuned out in the Gatorade program has something to do with this term and realize that as the speaker became technical about the nutritional and metabolic properties of Gatorade, you lost interest because you were unfamiliar with the terms being used. This highlights one aspect of a presentation that a speaker can focus on to influence the perception process. Not everyone in the audience will understand all the terminology, so by defining terms, providing visual aid cues, or speaking in common terms, you can make your topic and its presentation more accessible to a larger percentage of your audience.

Now, if you were asked to recall the basic properties of Gatorade after watching the program, could you? Even if you recall the general idea of the program, you may have a hard time remembering any specific property because you were focused on your hunger. Although you may have *heard* the words, you may not have chosen to *listen* to them. Hearing means you heard words, but listening implies you actively chose to listen to the program, processing the sounds, following the thread of discussion, making it easier for you to recall. This again illustrates the point that you chose one stimuli over another, in effect selecting what to pay attention to, and if the speaker was competing for your attention with more attractive, interesting or distracting stimuli, you probably just tuned him or her out, in effect deselecting them.

Organization

Organization is the process of sorting information into logical categories or series. We often take things we perceive and organize them into categories based on what we have perceived previously. Think back to the Gatorade video. Suppose the speaker started out with an attention statement and quickly moved to highlight three main points in the introduction. While the attention statement got you, by the second main point you were already starting to think, "This is going to be just another speech on how great

Gatorade is for my body." You may think this because you have already heard other speakers presented similar information and you classify what you think this presentation is going to be in relation to your previous experiences.

But this speaker may have given some thought to the presentation and how to make it unique and interesting, and prepared their discussion on the nutritional aspects in more depth. As a result, the information may have been organized into categories like ingredients, how your body uses the ingredients, and what the net result is. The final conclusion might be that if you exercise and burn off the calories present in Gatorade, it might be a positive choice, but if you drink it just to drink it, then it will only provide you with empty calories just like any other soft drink.

Organization Schemes

The organization scheme used to create three categories focuses on nutrition and the process by which Gatorade's ingredients are used by the body. The conclusion creates two categories of consumers. This organization scheme can promote active listening and allow the audience to follow, but the speaker must take into account the possibility that an audience member might think, "Oh no, not again." To set this presentation apart from others the audience might have heard, the speaker could include a phrase like, "Is Gatorade always for you? Not necessarily. Let's look at…" which gains attention and penetrates a stereotype.

When you write a document or give a presentation, you may not be able to anticipate all the ways an audience might organize the information you present or how they might use it, but by investing time in seeing it from their perspective, you can improve your organization and be a more effective communicator.

For example, suppose you are assigned the task of writing a cost-benefit analysis report on a specific product currently in development. Do you already know the essential points you need to include and the common industry standards for this type of report? You may not know, but you have written an essay before and appreciate the need for organization. Your ability to organize information, taking something that you know or have experienced and applying it to new information, helps you make sense of your world.

Gestalt Principles of Organization

In the early twentieth century, some psychologists thought we could examine parts of things, much as a scientist would examine an atom, and make a whole and complete picture regardless of context. Their theory was that the setting and scene would not influence the picture or perspective. In response to this view, other psychologists developed what they called Gestalt principles—the German word "Gestalt" referring to the unified whole. According to Gestalt theory, context matters, and the whole is greater than the sum of the parts. What you see and how you see it matters, and you yourself play a role in that perception of organization.

In the fifth of the Note 3.1 "Introductory Exercises" for this chapter, you were asked to connect nine dots with four straight lines, without retracing any line. Did you find a solution? (A common solution appears at the end of this chapter.) The key to solving this puzzle is finding a way to "think outside the box"—in this case, to take your pencil outside the implied square, or box, formed by the three rows of dots. The physical configuration of the dots contributed to the illusion of the "box." But in fact there is no box, and our tendency to see one where one does not exist creates barriers to solving the puzzle. Gestalt theory states that we will perceive the nine dots as belonging to a whole—a group or set having a certain shape—whether or not that whole actually exists.

Gestalt principles apply not only to images or objects, but also to ideas and concepts. You can associate two or more bits of information in predictable ways, but your perspective can influence your view of the overall idea. We don't always have all the information we need to draw a conclusion, literally drawing a series of relationships to form a whole picture in our minds, so we often fill in the gaps. We guess and make logical leaps, even suspend disbelief, all in an effort to make sense of our experiences.

In your presentations, if you jump from topic to topic or go off on a tangent, what happens to the listener's ability to listen and follow you effectively? Why make barriers for your audience when you've worked so hard to get their attention? How does this relate to Gestalt principles? By failing to recognize our natural tendency to want ideas, shapes, or words to make sense, the author is confusing the reader. What happens when the reader is confused? He or she moves on to something else, and leaves your writing behind. The opposite of clear and concise, confused, and poorly organized writing can distract and defeat even the most motivated of readers. Table 2.2.2.2lists some of the Gestalt organization principles.

Table 2.2.2.1: Gestalt Principles of Organization

Principle	Definition	Example

Principle	Definition	Example
Proximity	Organization based on relationship of space to objects	Next to me on the beach, I see my daughter playing with her pail and shovel; in the middle distance, a trio of kayakers paddle by; farther away, I see several power boats, and in the far distance, the green shore of Long Island.
Continuity	Drawing connections between things that occur in sequence	I am beginning to notice a pattern in the absentee rate in our department. For the past year, more workers have been absent on the first Friday of the month than on other days. I expect we will again have many absences next Friday, as it is the first Friday of the month.
Similarity	Grouping things or concepts by properties they share	To make appliquéd candles, (Ruffman, 2007) you will need the following: 1. Decorative material to appliqué: floral (fresh flowers, pine needles, or leaves), homey (dried beans or grains) or folksy (small nuts and bolts) 2. Candle body: fat candles (at least 4” diameter to keep dried flowers away from flame), natural colored wax (sheets or chunks of beeswax or paraffin) 3. Tools: a microwave flower press, a ½-inch paintbrush, a tin pie plate, a chip carving knife or v-tool
Uniformity/Homogeneity	Noting ways in which concepts or objects are alike	Armored personnel carriers include the Stryker, LAV, Pandur, M113 Armored Personnel Carrier, Amphibious Assault Vehicle, Expeditionary Fighting Vehicle, Grizzly APC, Rhino Runner, Bison (armored personnel carrier), and Mamba APC.
Figure and Ground	Emphasis on a single item that stands out from its surroundings	On a rock in Copenhagen Harbor stands the small statue of The Little Mermaid, a memorial to one of Denmark’s most beloved citizens, Hans Christian Andersen.
Symmetry	Balancing objects or ideas equally from one side to the other	Representing the conservative viewpoint was *Wall Street Journal* correspondent John Emshwiller; the liberal viewpoint was argued by *New York Times* columnist Paul Krugman.
Closure	Tendency to use previous knowledge to fill in the gaps in an incomplete idea or picture	The wording of the memo was, “It is important for all employees to submit their health insurance enrollment selections no than November 1,” but everyone understood that it should have said, “no later than November 1.”

Let’s examine some of the commonly used Gestalt principles: proximity, continuation, similarity, and closure.

It makes sense that we would focus first on things around us and the degree to which they are close to us and to each other. Proximity is the perceptual organization of information based on physical relationship of space to objects. In creating a scene for a play or movie, a stage designer knows that the audience will tend to pay attention to objects in the foreground, unless special emphasis is added to objects farther away. This principle extends to people and daily life. Just because someone is walking down the street next to someone else, this does not necessarily mean they have a connection to each other—they are simply in close proximity.

We also see a similar tendency in the principle of continuity. We like things to be orderly, and our brain will see lines and movement where none exist. Examine Figure 2.2.2.1. What you see? Do you perceive two lines crossing one another? Or an X?

The principle of continuity predicts that you would demonstrate a tendency to perceive continuous figures. The two lines cross one another, and you might even say from top to bottom or the reverse, when there is no motion indicated.

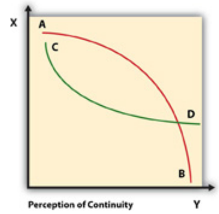

Figure $2.2.2.1$ Continuity

Continuity can also lead to a well-known logical fallacy, or false belief, involving sequence and cause-effect relationships. If something happens after something else, does that mean that the first event caused the second event? You wish for rain and it rains. Connected? Logic and common sense would say no. You have a dream about a plane crash, and the next day there is a major airline crash. Did your dream cause the crash? Obviously not.

When objects or events are similar, we tend to group them together in our minds, again making the assumption that they are related by their common characteristics. Similarity is the perceptual organization of information based on perceived points of common characteristics across distinct items. For example, a horse, a mule, and a donkey are distinct, but we perceive them as being similar to one another.

The principle of closure underscores our tendency to use previous knowledge to fill in the gaps in an incomplete idea or picture. If you are talking to a friend on your cell phone and the connection breaks up for a few seconds, you may miss some words, but you can grasp the main idea by automatically guessing what was said. You do this based on your previous history of communicating with your friend on similar topics. Do you always guess correctly? Of course not. Look at Figure $2.2.2.2$

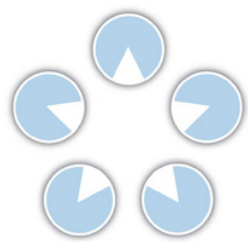

Figure $2.2.2.2$: Do you see a ring of Pac-Man-like circles?

When we say we see a star, we don't really see one because there is no star. The five Pac-Man shapes in that arrangement, however, allow our mind to say, "If this was connected to this and that was connected to that, there would be a star." Sometimes the sense we make does not match reality, and we see a star where there is no star.

Sometimes we "fill in the blanks" without even being aware of it. When we speak on a topic and fail to clearly articulate a point or substantiate an assertion, we leave a "hole" in our presentation that the listener may or may not be aware of, but will predictably fill. This tendency to jump to conclusions may seem like a disadvantage, but it is only a disadvantage if you are unaware of it. If fact, it's a positive ability that allows us to infer and guess correctly, often in times of crisis when time is limited. But we don't always guess correctly. If your goal is to communicate your message to the audience, then by definition you don't want a "pothole" to interrupt, distract, or create a barrier that leads to misinterpretation.

Interpretation

After selection and organization, interpretation is the third step in the perception process. From your past experiences combined with your current expectations, you assign meaning to the current stimuli. If the word "college" for you has meaning, then what comes to mind? If a high school student has to take the PSAT (Preliminary Scholastic Aptitude Test) in the morning, what does that word mean to him? Will his state of anxiety and anticipation over the importance of the exam and the unknown word of college influence how he responds to that word? If his parents ask, "Where are you planning on going to college?" when he is simply focused on the test that may influence his options, the word itself may take on a whole new meaning. It may invite issues of control ("Which college? You are going to the college we went to, right?") or of self-esteem ("Am I good enough to go to college?") to become associated with the word "college."

The word itself may shift in terms of meaning across time. Let's say the high school student did well on the PSAT and went to the same college as his parents. Is it the same college, or just the same location and buildings? It may have a tradition, but it is at the same time new and ever-changing, just like the students that arrive each year. Fast forward a couple of years and the college may represent a place where you studied, made friends, and came to know yourself. In a few more years, you may choose to become a member of the alumni association. The meaning of the word "college" can shift intrapersonally across time, and can mean different things to different groups.

Let's rewind and look back at a test gone bad, taken by a less than adequately prepared student from a household where there may not be sufficient resources to make the dream of college come true. The image of college may remain an image instead of a reality; a goal not attained. Structural barriers like socioeconomic status, parental and peer influences, and the need to work to support yourself or your family can all influence your decisions and perspective.

Key Takeaway

Perceptions are influenced by how we select, organize, and interpret words and ideas.

Exercises

1. Do a search on "M. C. Escher" or "tessellation art." How does Escher's work manipulate your perception? Share your opinions with your classmates.
2. Think of ways to describe something you know, such as what your home looks like. Organize the information using one of the Gestalt principles (e.g., proximity, similarity, continuity, or closure). Present the organized information to a classmate. Can your classmate tell which Gestalt principle you have used?
3. How does the process of perception limit our view, or expand it? Can we choose how to perceive things? Write a one- to two-page essay on this topic and discuss it with a classmate.
4. Think of a time when you jumped to a conclusion and later learned that it was incorrect. Write a brief summary of the experience. Share and compare with classmates.

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2.2.3: Differences in Perception

Learning Objectives

- Determine how perception differs between people.

Someone may say what you consider to be a simple exclamatory sentence—“Earn college credit while studying abroad!”—but a thought may come to mind: “How will I fit in as an outsider in a foreign country?” What makes you a member of a group? How you distinguish between those who belong in our family, group, or community and those who do not is central to our study of communication. Learning to see issues and experiences from multiple perspective can be a challenging task, but the effort is worth it. Increased understanding about each other can positively impact our communication and improve the degree to which we can share and understand meaning across languages, cultures, and divergent perspectives.

Why Don’t We All See Eye to Eye?

People perceive things differently. We choose to select different aspects of a message to focus our attention based on what interests us, what is familiar to us, or what we consider important. Often, our listening skills could use improvement. Listening and thinking are directly related. When you are reading, what do you hear? When you are talking with someone, what do you hear? If the sound of your thoughts or voice is at least one of your answers, then communication is not occurring. Try to read this paragraph again without interruption. Your tendency might be to skim over the words, or to focus on key vocabulary, but if you allow your thoughts to stray from the text you are reading, even for a moment, you are interrupting your processing of the written word, or reading. Interruptions will impair your ability to understand and retain information, and make studying even harder.

In order to better understand perception, we will examine how you choose to pay attention, remember, and interpret messages within the communication process.

Individual Differences in Perception

Why do people perceive things in different ways? To answer the question, recall that we all engage in selection, or choosing some stimuli while ignoring others. We exist as individuals within a community, regardless of whether we are conscious of it. Do you like 80s music? Prefer the Beatles? Nothing before 2005? Your tastes in music involve the senses, and what you choose to experience is influenced by your context and environment. Your habits, values, and outlook on life are influenced by where you come from and where you are.

The attributes that cause people to perceive things differently are known as individual differences. Let’s examine several of the most important ones.

Physical characteristics influence how we perceive and respond to information. You may be asked to design a sign that says, “Watch your head,” which will be placed next to a six foot six inch overhang that is above floor level. While a few very tall people will have to worry about hitting their heads on the overhang, most people in the world are not that tall. Tall and short individuals will perceive this sign differently.

Your psychological state can also influence what you read and listen to, and why you do so. The emergency procedures binder on the wall next to the first aid kit doesn’t mean much to you until a coworker falls and suffers some bad cuts and bruises. If you were asked to design the binder and its contents, could you anticipate a psychological state of anxiety that would likely be present when someone needed the information? If so, then you might use clear bullet lists, concise, declarative sentences, and diagrams to communicate clearly.

Your cultural background plays a significant role in what and how you perceive your world. You may be from a culture that values community. For example, the message across the advertisement reads: *Stand out from the crowd*. Given your cultural background, it may not be a very effective slogan to get your attention.

Our perceptual set involves our attitudes, beliefs, and values about the world. Perhaps you’ve heard the phrase, “Looking at the world through rose-colored glasses” and can even think of someone as an example. We experience the world through mediated images and mass communication. We also come to know one another interpersonally in groups. All these experiences help form our mental expectations of what is happening and what will happen.

Think about your brand preferences, your choice of transportation, your self-expression through your clothing, haircut, and jewelry—all these external symbols represent in some way how you view yourself within your community and the world. We can extend this perspective in many ways, both positive and negative, and see that understanding the perspective of the audience takes on new levels of importance.

Key Takeaway

Our perceptions are influenced by our individual differences and preconceived notions.

Exercises

1. When you watch a film with friends, make a point of talking about it afterward and listen to how each person perceived aspects of the film. Ask them each to describe it in ten words or less. Did they use the same words? Did you see it the same way, or differently? Did you catch all the points, frames of reference, values, or miss any information? What does this say about perception?
2. Think of a time when you misunderstood a message. What was your psychological state at the time? Do you think you would have understood the message differently if you had been in a different psychological state?
3. Think of a time when someone misunderstood your message. What happened and why? Share and compare with classmates.

2.2.4: Getting to Know Your Audience

Learning Objectives

1. Describe three ways to better understand and reach your audience.

Writing to your audience's expectations is key to your success, but how do you get a sense of your readers? Research, time, and effort. At first glance you may think you know your audience, but if you dig a little deeper you will learn more about them and become a better speaker.

Examine Figure 2.2.4.1, often called the iceberg model. When you see an iceberg on the ocean, the great majority of its size and depth lie below your level of awareness. When you write a document or give a presentation, each person in your reading or listening audience is like the tip of an iceberg. You may perceive people of different ages, races, ethnicities, and genders, but those are only surface characteristics. This is your challenge. When you communicate with a diverse audience, you are engaging in intercultural communication. The more you learn about the audience, the better you will be able to navigate the waters, and your communication interactions, safely and effectively.

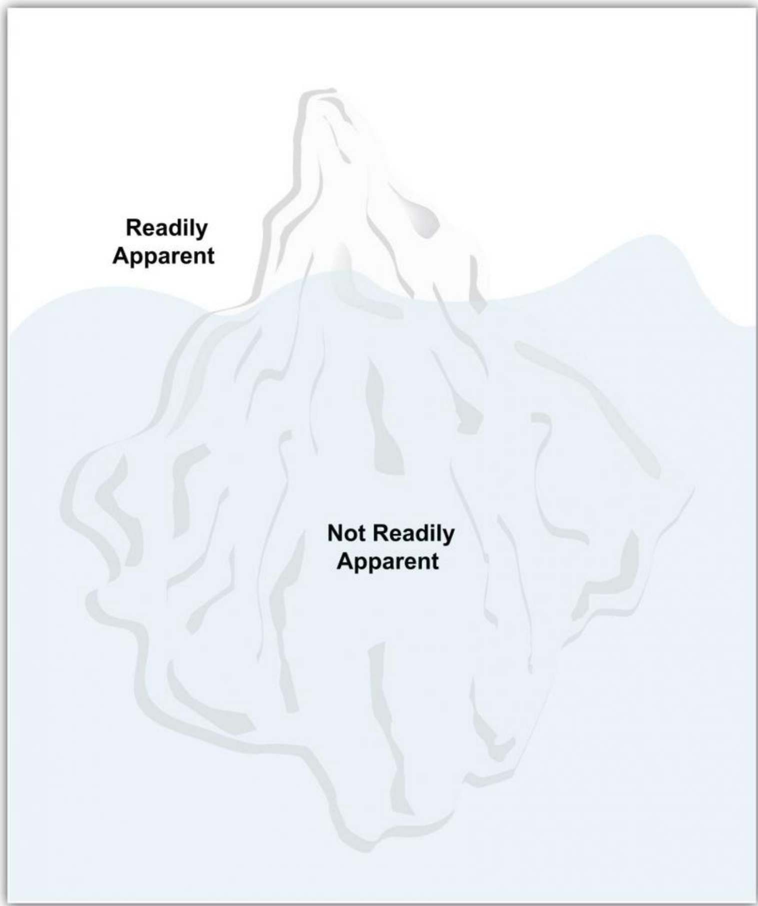

Figure 2.2.4.1 Iceberg Model

Theodore Roosevelt pointed out that "the most important single ingredient in the formula of success is knowing how to get along with people." Knowing your audience well before you speak is essential. Here are a few questions to help guide you in learning more about your audience:

- How big is the audience?
- What are their backgrounds, gender, age, jobs, education, and/or interests?
- Do they already know about your topic? If so, how much?

- Will other materials be presented or available? If so, what are they, what do they cover, and how do they relate to your message?
- How much time is allotted for your presentation, or how much space do you have for your written document? Will your document or presentation stand alone or do you have the option of adding visuals, audio-visual aids, or links?

Demographic Traits

Demographic traits refer to the characteristics that make someone an individual, but that he or she has in common with others. For example, if you were born female, then your view of the world may be different from that of a male, and may be similar to that of many other females. Being female means that you share this "femaleness" trait with roughly half the world's population.

How does this demographic trait of being female apply to communication? For example, we might find that women tend to be more aware than the typical male of what it means to be capable of becoming pregnant, or to go through menopause. If you were giving a presentation on nutrition to a female audience, you would likely include more information about nutrition during pregnancy and during menopause than you would if your audience were male.

We can explore other traits by considering your audience's age, level of education, employment or career status, and various other groups they may belong to. Imagine that you are writing a report on the health risks associated with smoking. To get your message across to an audience of twelve-year-olds, clearly you would use different language and different examples than what you would use for an audience of adults age fifty-five and older. If you were writing for a highly educated audience—say, engineering school graduates—you would use much more scholarly language and rigorous research documentation than if you were writing for first-year college students.

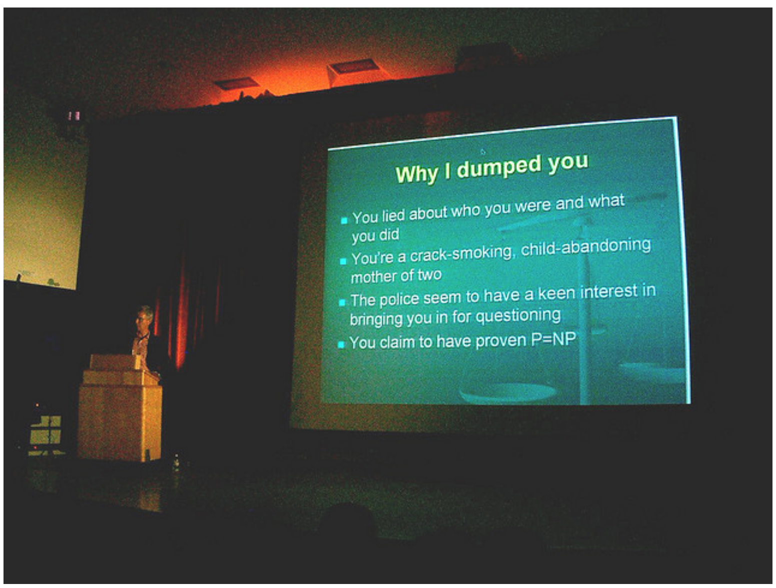

Figure 2.2.4.2: Tailor your message to your audience. Todd Lappin – David Byrne's "PowerPoint as art" lecture – CC BY-NC 2.0.

Writing for readers in the insurance industry, you would likely choose examples of how insurance claims are affected by whether or not a policyholder smokes, whereas if you were writing for readers who are athletes, you would focus on how the human body reacts to tobacco. Similarly, if you were writing for a community newsletter, you would choose local examples, whereas if your venue was a Web site for parents, you might choose examples that are more universal.

Audiences tend to be interested in messages that relate to their interests, needs, goals, and motivations. Demographic traits can give us insight into our audience and allow for an audience-centered approach to your assignment that will make you a more effective communicator (Beebe, 1997).

Improving Your Perceptions of Your Audience

The better you can understand your audience, the better you can tailor your communications to reach them. To understand them, a key step is to perceive clearly who they are, what they are interested in, what they need, and what motivates them. This ability to perceive is important with audience members from distinct groups, generations, and even cultures. William Seiler and Melissa

Beall offer us six ways to improve our perceptions, and therefore improve our communication, particularly in public speaking; they are listed in Table 2.2.4.1.

Table 2.2.4.1 Perceptual Strategies for Success

Perceptual Strategy	Explanation
Become an active perceiver	We need to actively seek out as much information as possible. Placing yourself in the new culture, group, or co-culture can often expand your understanding.
Recognize each person's unique frame of reference	We all perceive the world differently. Recognize that even though you may interact with two people from the same culture, they are individuals with their own set of experiences, values, and interests.
Recognize that people, objects, and situations change	The world is changing and so are we. Recognizing that people and cultures, like communication process itself, are dynamic and ever changing can improve your intercultural communication.
Become aware of the role perceptions play in communication	As we explored in Chapter 2, perception is an important aspect of the communication process. By understanding that our perceptions are not the only ones possible can limit ethnocentrism and improve intercultural communication.
Keep an open mind	The adage "A mind is like a parachute—it works best when open" holds true. Being open to differences can improve intercultural communication.
Check your perceptions	By learning to observe, and acknowledging our own perceptions, we can avoid assumptions, expand our understanding, and improve our ability to communicate across cultures.

Fairness in Communication

Finally, consider that your audience has several expectations of you. No doubt you have sat through a speech or classroom lecture where you asked yourself, "Why should I listen?" You have probably been assigned to read a document or chapter and found yourself wondering, "What does this have to do with me?" These questions are normal and natural for audiences, but people seldom actually state these questions in so many words or say them out loud.

In a report on intercultural communication, V. Lynn Tyler offers us some insight into these audience expectations, which can be summarized as the need to be fair to your audience. One key fairness principle is reciprocity, or a relationship of mutual exchange and interdependence. Reciprocity has four main components: mutuality, nonjudgmentalism, honesty, and respect.

Mutuality means that the speaker searches for common ground and understanding with his or her audience, establishing this space and building on it throughout the speech. This involves examining viewpoints other than your own and taking steps to insure the speech integrates an inclusive, accessible format rather than an ethnocentric one.

Nonjudgmentalism involves willingness to examine diverse ideas and viewpoints. A nonjudgmental communicator is open-minded, and able to accept ideas that may be strongly opposed to his or her own beliefs and values.

Another aspect of fairness in communication is honesty: stating the truth as you perceive it. When you communicate honestly, you provide supporting and clarifying information and give credit to the sources where you obtained the information. In addition, if there is significant evidence opposing your viewpoint, you acknowledge this and avoid concealing it from your audience.

Finally, fairness involves respect for the audience and individual members—recognizing that each person has basic rights and is worthy of courtesy. Consider these expectations of fairness when designing your message and you will more thoroughly engage your audience.

Key Takeaway

To better understand your audience, learn about their demographic traits, such as age, gender, and employment status, as these help determine their interests, needs, and goals. In addition, become aware of your perceptions and theirs, and practice fairness in your communications.

Exercises

1. List at least three demographic traits that apply to you. How does belonging to these demographic groups influence your perceptions and priorities? Share your thoughts with your classmates.
2. Think of two ways to learn more about your audience. Investigate them and share your findings with your classmates.
3. Think of a new group you have joined, or a new activity you have become involved in. Did the activity or group have an influence on your perceptions? Explain the effects to your classmates.
4. When you started a new job or joined a new group, to some extent you learned a new language. Please think of at least three words that outsiders would not know and share them with the class and provide examples.

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2.2.5: Listening and Reading for Understanding

Learning Objectives

- Explain the importance of becoming an active listener and reader.

As the popular author and Hollywood entrepreneur Wilson Mizner said, “A good listener is not only popular everywhere, but after a while he knows something.” Learning to listen to your conversational partner, customer, supplier, or supervisor is an important part of business communication. Too often, instead of listening we mentally rehearse what we want to say. Similarly, when we read, we are often trying to multitask and therefore cannot read with full attention. Inattentive listening or reading can cause us to miss much of what the speaker is sharing with us.

Communication involves the sharing and understanding of meaning. To fully share and understand, practice active listening and reading so that you are fully attentive, fully present in the moment of interaction. Pay attention to both the actual words and for other clues to meaning, such as tone of voice or writing style. Look for opportunities for clarification and feedback when the time comes for you to respond, not before.

Active Listening and Reading

You’ve probably experienced the odd sensation of driving somewhere and, having arrived, have realized you don’t remember driving. Your mind may have been filled with other issues and you drove on autopilot. It’s dangerous when you drive like that, and it is dangerous in communication. Choosing to listen or read attentively takes effort. People communicate with words, expressions, and even in silence, and your attention to them will make you a better communicator. From discussions on improving customer service to retaining customers in challenging economic times, the importance of listening comes up frequently as a success strategy.

Here are some tips to facilitate active listening and reading:

- Maintain eye contact with the speaker; if reading, keep your eyes on the page.
- Don’t interrupt; if reading, don’t multitask.
- Focus your attention on the message, not your internal monologue.
- Restate the message in your own words and ask if you understood correctly.
- Ask clarifying questions to communicate interest and gain insight.

When the Going Gets Tough

Our previous tips will serve you well in daily interactions, but suppose you have an especially difficult subject to discuss, or you receive a written document delivering bad news. In a difficult situation like this, it is worth taking extra effort to create an environment and context that will facilitate positive communication.

Here are some tips that may be helpful:

- **Set aside a special time**. To have a difficult conversation or read bad news, set aside a special time when you will not be disturbed. Close the door and turn off the TV, music player, and instant messaging client.
- **Don’t interrupt**. Keep silent while you let the other person “speak his piece.” If you are reading, make an effort to understand and digest the news without mental interruptions.
- **Be nonjudgmental**. Receive the message without judgment or criticism. Set aside your opinions, attitudes, and beliefs.
- **Be accepting**. Be open to the message being communicated, realizing that acceptance does not necessarily mean you agree with what is being said.
- **Take turns**. Wait until it is your turn to respond, and then measure your response in proportion to the message that was delivered to you. Reciprocal turn-taking allows each person have his say.
- **Acknowledge**. Let the other person know that you have listened to the message or read it attentively.
- **Understand**. Be certain that you understand what your partner is saying. If you don’t understand, ask for clarification. Restate the message in your own words.
- **Keep your cool**. Speak your truth without blaming. A calm tone will help prevent the conflict from escalating. Use “I” statements (e.g., “I felt concerned when I learned that my department is going to have a layoff”) rather than “you” statements (e.g., “you want to get rid of some of our best people”).

Finally, recognize that mutual respect and understanding are built one conversation at a time. Trust is difficult to gain and easy to lose. Be patient and keep the channels of communication open, as a solution may develop slowly over the course of many small interactions. Recognize that it is more valuable to maintain the relationship over the long term than to "win" in an individual transaction.

Key Takeaway

Part of being an effective communicator is learning to receive messages from others through active listening and reading.

Exercises

1. Pair up with a classmate and do a role-play exercise in which one person tries to deliver a message while the other person multitasks and interrupts. Then try it again while the listener practices active listening. How do the two communication experiences compare? Discuss your findings.
2. Select a news article and practice active reading by reading the article and summarizing each of its main points in your own words. Write a letter to the editor commenting on the article—you don't have to send it, but you may if you wish.
3. In a half-hour period of time, see if you can count how many times you are interrupted. Share and compare with your classmates.

2.2.6: Additional Resources

Explore the Web site of the National Association for Self-Esteem. www.self-esteem-nase.org

Forum Network offers a wealth of audio and video files of speeches on various topics. Listen to a lecture titled "Selective Attention: Neuroscience and the Art Museum" by Barbara Stafford, professor of art history, University of Chicago. http://forum-network.org/lectures/selective-attention-neuroscience-and-art-museum/

Explore the Web site of the journal *Perception*. www.perceptionweb.com

Visit this About.com site to learn more about the Gestalt principles of perception. http://psychology.about.com/od/sensationandperception/ss/gestaltlaws_4.htm

Visit About.com to read an article by Kendra Van Wagner on the Gestalt laws of perceptual organization. http://psychology.about.com/od/sensationandperception/ss/gestaltlaws.htm

Visit the U.S. Environmental Protection Agency's site to read about demographic traits and their relationship to environmental issues. www.epa.gov/greenkit/traits.htm

Philosophe.com offers a collection of articles about understanding your audience when you design a Web site. http://philosophe.com/understanding_users

Read more about active listening on this MindTools page. http://www.mindtools.com/CommSkll/ActiveListening.htm

Consider these academic survival tips provided by Chicago State University. www.csu.edu/cas/chemistryphysicsengineering/engineeringstudies/acadsurvivaltips.htm

SECTION OVERVIEW

2.3: Revising and Presenting Your Writing

Just when you think the production of your document is done, the revision process begins. Runners often refer to “the wall,” where the limits of physical exertion are met and exhaustion is imminent. The writing process requires effort, from overcoming writer’s block to the intense concentration composing a document often involves. It is only natural to have a sense of relief when your document is drafted from beginning to end. This relief is false confidence, though. Your document is not complete, and in its current state it could, in fact, do more harm than good. Errors, omissions, and unclear phrases may lurk within your document, waiting to reflect poorly on you when it reaches your audience. Now is not time to let your guard down, prematurely celebrate, or to mentally move on to the next assignment. Think of the revision process as one that hardens and strengthens your document, even though it may require the sacrifice of some hard-earned writing.

Thumbnail: pixabay.com/photos/man-reading-touchscreen-blog-791049/

2.3.1: General Revision Points to Consider

Learning Objectives

- Discuss the process of revision
- List three general elements of every document that require revision

General revision requires attention to content, organization, style, and readability. These four main categories should give you a template from which to begin to explore details in depth. A cursory review of these elements in and of itself is insufficient for even the briefest review. Across this chapter we will explore ways to expand your revision efforts to cover the common areas of weakness and error. You may need to take some time away from your document to approach it again with a fresh perspective. Writers often juggle multiple projects that are at different stages of development. This allows the writer to leave one document and return to another without losing valuable production time. Overall, your goal is similar to what it was during your writing preparation and production: a clear mind.

Evaluate Content

Content is only one aspect of your document. Let's say you were assigned a report on the sales trends for a specific product in a relatively new market. You could produce a one-page chart comparing last year's results to current figures and call it a day, but would it clearly and concisely deliver content that is useful and correct? Are you supposed to highlight trends? Are you supposed to spotlight factors that contributed to the increase or decrease? Are you supposed to include projections for next year? Our list of questions could continue, but for now let's focus on content and its relationship to the directions. Have you included the content that corresponds to the given assignment, left any information out that may be necessary to fulfill the expectations, or have you gone beyond the assignment directions? Content will address the central questions of who, what, where, when, why and how within the range and parameters of the assignment.

Evaluate Organization

Organization is another key aspect of any document. Standard formats that include an introduction, body, and conclusion may be part of your document, but did you decide on a direct or indirect approach? Can you tell? A direct approach will announce the main point or purpose at the beginning, while an indirect approach will present an introduction before the main point. Your document may use any of a wide variety of organizing principles, such as chronological, spatial, compare/contrast. Is your organizing principle clear to the reader?

Beyond the overall organization, pay special attention to transitions. Readers often have difficulty following a document if the writer makes the common error of failing to make one point relevant to the next, or to illustrate the relationships between the points. Finally, your conclusion should mirror your introduction and not introduce new material.

Evaluate Style

Style is created through content and organization, but also involves word choice and grammatical structures. Is your document written in an informal or formal tone, or does it present a blend, a mix, or an awkward mismatch? Does it provide a coherent and unifying voice with a professional tone? If you are collaborating on the project with other writers or contributors, pay special attention to unifying the document across the different authors' styles of writing. Even if they were all to write in a professional, formal style, the document may lack a consistent voice. Read it out loud—can you tell who is writing what? If so, that is a clear clue that you need to do more revising in terms of style.

Evaluate Readability

Readability refers to the reader's ability to read and comprehend the document. A variety of tools are available to make an estimate of a document's reading level, often correlated to a school grade level. If this chapter has a reading level of 11.8, it would be appropriate for most readers in the eleventh grade. But just because you are in grade thirteen, eighteen, or twenty-one doesn't mean that your audience, in their everyday use of language, reads at a postsecondary level. As a business writer, your goal is to make your writing clear and concise, not complex and challenging.

You can often use the "Tools" menu of your word processing program to determine the approximate reading level of your document. The program will evaluate the number of characters per word, add in the number of words per sentence, and come up with a rating. It may also note the percentage of passive sentences, and other information that will allow you to evaluate readability. Like any computer-generated rating, it should serve you as one point of evaluation, but not the only point. Your concerted effort to choose words you perceive as appropriate for the audience will serve you better than any computer evaluation of your writing.

Key Takeaway

The four main categories—content, organization, style, and readability—provide a template for general revision.

Exercises

1. Select a document, such as an article from a Web site, newspaper, magazine, or a piece of writing you have completed for a course. Evaluate the document according to the four main categories described in this section. Could the document benefit from revision in any of these areas? Discuss your findings with your classmates.
2. Interview a coworker or colleague and specifically ask how much time and attention they dedicate to the revision process of their written work. Compare your results with classmates.
3. Find a particularly good example of writing according to the above criteria. Review it and share it with your classmates.
4. Find a particularly bad example of writing according to the above criteria. Review it and share it with your classmates.

2.3.2: Specific Revision Points to Consider

Learning Objectives

1. List six specific elements of every document to check for revision

When revising your document, it can be helpful to focus on specific points. When you consider each point in turn, you will be able to break down the revision process into manageable steps. When you have examined each point, you can be confident that you have avoided many possible areas for errors. Specific revision requires attention to the following:

- Format
- Facts
- Names
- Spelling
- Punctuation
- Grammar

Let's examine these characteristics one by one.

Format

Format is an important part of the revision process. Format involves the design expectations of author and audience. If a letter format normally designates a date at the top, or the sender's address on the left side of the page before the salutation, the information should be in the correct location. Formatting that is messy or fails to conform to the company style will reflect poorly on you before the reader even starts to read it. By presenting a document that is properly formatted according to the expectations of your organization and your readers, you will start off making a good impression.

Facts

Another key part of the revision process is checking your facts. Did you know that news organizations and magazines employ professional fact-checkers? These workers are responsible for examining every article before it gets published and consulting original sources to make sure the information in the article is accurate. This can involve making phone calls to the people who were interviewed for the article—for example, "Mr. Diaz, our report states that you are thirty-nine years old. Our article will be published on the fifteenth. Will that be your correct age on that date?" Fact checking also involves looking facts up in encyclopedias, directories, atlases, and other standard reference works; and, increasingly, in online sources.

While you can't be expected to have the skills of a professional fact-checker, you do need to reread your writing with a critical eye to the information in it. Inaccurate content can expose you and your organization to liability, and will create far more work than a simple revision of a document. So, when you revise a document, ask yourself the following:

- Does my writing contain any statistics or references that need to be verified?
- Where can I get reliable information to verify it?

It is often useful to do independent verification—that is, look up the fact in a different source from the one where you first got it. For example, perhaps a colleague gave you a list of closing averages for the Dow Jones Industrial on certain dates. You still have the list, so you can make sure your document agrees with the numbers your colleague provided. But what if your colleague made a mistake? The Web sites of the *Wall Street Journal* and other major newspapers list closings for "the Dow," so it is reasonably easy for you to look up the numbers and verify them independently.

Names

There is no more embarrassing error in business writing than to misspell someone's name. To the writer, and to some readers, spelling a name "Michelle" instead of "Michele" may seem like a minor matter, but to Michele herself it will make a big difference. Attribution is one way we often involve a person's name, and giving credit where credit is due is essential. There are many other reasons for including someone's name, but regardless of your reasons for choosing to focus on them, you need to make sure the spelling is correct. Incorrect spelling of names is a quick way to undermine your credibility; it can also have a negative impact on your organization's reputation, and in some cases it may even have legal ramifications.

Figure 2.3.2.1: Always spell a person's name correctly. kersy83 – Youth Psyche – CC BY-ND-ND 2.0.

Spelling

Correct spelling is another element essential for your credibility, and errors will be glaringly obvious to many readers. The negative impact on your reputation as a writer, and its perception that you lack attention to detail or do not value your work, will be hard to overcome. In addition to the negative personal consequences, spelling errors can become factual errors and destroy the value of content. This may lead you to click the "spell check" button in your word processing program, but computer spell-checking is not enough. Spell checkers have improved in the years since they were first invented, but they are not infallible. They can and do make mistakes.

Typically, your incorrect word may in fact be a word, and therefore, according to the program, correct. For example, suppose you wrote, "The major will attend the meeting" when you meant to write "The mayor will attend the meeting." The program would miss this error because "major" is a word, but your meaning would be twisted beyond recognition.

Punctuation

Punctuation marks are the traffic signals, signs, and indications that allow us to navigate the written word. They serve to warn us in advance when a transition is coming or the complete thought has come to an end. A period indicates the thought is complete, while a comma signals that additional elements or modifiers are coming. Correct signals will help your reader follow the thoughts through sentences and paragraphs, and enable you to communicate with maximum efficiency while reducing the probability of error (Strunk, 1979).

Table 2.3.2.1 lists twelve punctuation marks that are commonly used in English in alphabetical order along with an example of each.

Table 2.3.2.1: Punctuation Marks

	Symbol	Example
Apostrophe	'	Michele's report is due tomorrow.
Colon	:	This is what I think: you need to revise your paper.
Comma	,	The report advised us when to sell, what to sell, and where to find buyers.
Dash	—	This is more difficult than it seems—buyers are scarce when credit is tight.
Ellipsis	…	Lincoln spoke of "a new nation…dedicated to the proposition that all men are created equal."
Exclamation Point	!	How exciting!
Hyphen	–	The question is a many-faceted one.
Parentheses	( )	To answer it (or at least to begin addressing it) we will need more information.
Period	.	The answer is no. Period. Full stop.

	Symbol	Example
Question Mark	?	Can I talk you into changing your mind?
Quotation Marks	“ ”	The manager told him, “I will make sure Renée is available to help you.”
Semicolon	;	Theresa was late to the meeting; her computer had frozen and she was stuck at her desk until a tech rep came to fix it.

It may be daunting to realize that the number of possible punctuation errors is as extensive as the number of symbols and constructions available to the author. Software program may catch many punctuation errors, but again it is the committed writer that makes the difference. Here we will provide details on how to avoid mistakes with three of the most commonly used punctuation marks: the comma, the semicolon, and the apostrophe.

Commas

The comma is probably the most versatile of all punctuation marks. This means you as a writer can use your judgment in many cases as to whether you need a comma or not. It also means that the possible errors involving commas are many. Commas are necessary some of the time, but careless writers often place a comma in a sentence where it is simply not needed.

Commas are used to separate two independent clauses joined by a conjunction like “but,” “and,” and “or.”

Example
The advertising department is effective, but don’t expect miracles in this business climate.

Commas are not used simply to join two independent clauses. This is known as the comma splice error, and the way to correct it is to insert a conjunction after the comma.

Examples
The advertising department is effective, the sales department needs to produce more results.
The advertising department is effective, *but* the sales department needs to produce more results.

Commas are used for introductory phrases and to offset clauses that are not essential to the sentence. If the meaning would remain intact without the phrase, it is considered nonessential.

Examples
After the summary of this year’s sales, the sales department had good reason to celebrate.
The sales department, *last year’s winner of the most productive award*, celebrated their stellar sales success this year.
The sales department celebrated their stellar sales success this year.

Commas are used to offset words that help create unity across a sentence like “however” and “therefore.”

Examples
The sales department discovered, *however*, that the forecast for next year is challenging.
However, the sales department discovered that the forecast for next year is challenging.

Commas are often used to separate more than one adjective modifying a noun.

Example
The sales department discovered the *troublesome, challenging* forecast for next year.

Commas are used to separate addresses, dates, and titles; they are also used in dialogue sequences.

Examples

Examples
John is from Ancud, Chile.
Katy was born on August 2, 2002.
Mackenzie McLean, D. V., is an excellent veterinarian.
Lisa said, "When writing, omit needless words."

Semicolons

Semicolons have two uses. First, they indicate relationships among groups of items in a series when the individual items are separated by commas. Second, a semicolon can be used to join two independent clauses; this is another way of avoiding the comma splice error mentioned above. Using a semicolon this way is often effective if the meaning of the two independent clauses is linked in some way, such as a cause-effect relationship.

Examples
Merchandise on order includes women's wear such as sweaters, skirts, and blouses; men's wear such as shirts, jackets, and slacks; and outwear such as coats, parkas, and hats.
The sales campaign was successful; without its contributions our bottom line would have been dismal indeed.

Apostrophes

The apostrophe, like the semicolon, has two uses: it replaces letters omitted in a contraction, and it often indicates the possessive.

Because contractions are associated with an informal style, they may not be appropriate for some professional writing. The business writer will—as always—evaluate the expectations and audience of the given assignment.

Examples
It's great news that sales were up. *It is* also good news that *we've* managed to reduce our advertising costs.

When you indicate possession, pay attention to the placement of the apostrophe. Nouns commonly receive "'s" when they are made possessive. But plurals that end in "s" receive a hanging apostrophe when they are made possessive, and the word "it" forms the possessive ("its") with no apostrophe at all.

Examples
Mackenzie*'s* sheep are ready to be sheared.
The parent*s'* meeting is scheduled for Thursday.
We are willing to adopt a dog that has already had its shots.

Grammar

Learning to use good, correct standard English grammar is more of a practice than an event, or even a process. Grammar involves the written construction of meaning from words and involves customs that evolve and adapt to usage over time. Because grammar is always evolving, none of us can sit back and rest assured that we "know" how to write with proper grammar. Instead, it is important to write and revise with close attention to grammar, keeping in mind that grammatical errors can undermine your credibility, reflect poorly on your employer, and cause misunderstandings.

Jean Wyrick has provided a list of common errors in grammar to watch out for, which we have adapted here for easy reference (Wyrick, 2008). In each case, the error is in *italics* and the *[correct form]* is italicized within square bracket.

Subject-Verb Agreement

The subject and verb should agree on the number under consideration. In faulty writing, a singular subject is sometimes mismatched with a plural verb form, or vice versa.

Examples
Sales have not been consistent and they *doesn't [do not]* reflect your hard work and effort.

Examples
The president appreciates your hard work and *wish [wishes]* to thank you.

Verb Tense

Verb tense refers to the point in time where action occurs. The most common tenses are past, present, and future. There is nothing wrong with mixing tenses in a sentence if the action is intended to take place at different times. In faulty or careless writing, however, they are often mismatched illogically.

Examples
Sharon was under pressure to finish the report, so she *uses [used]* a shortcut to paste in the sales figures.
The sales department holds a status meeting every week, and last week's meeting *will be [was]* at the Garden Inn.

Split Infinitive

The infinitive form of verb is one without a reference to time, and in its standard form it includes the auxiliary word "to," as in "to write is to revise." It has been customary to keep the "to" next to the verb; to place an adverb between them is known as splitting the infinitive. Some modern writers do this all the time (for example, "to boldly go…"), and since all grammar is essentially a set of customs that govern the written word, you will need to understand what the custom is where you work. If you are working with colleagues trained across the last fifty years, they may find split infinitives annoying. For this reason, it's often best to avoid splitting an infinitive wherever you can do so without distorting the meaning of the sentence.

Examples
The Marketing Department needs assistance *to accurately understand our readers [to understand our readers accurately]*.
David pondered *how to best revise [how best to revise]* the sentence.

Double Negative

A double negative uses two negatives to communicate a single idea, duplicating the negation. In some languages, such as Spanish, when the main action in the sentence is negative, it is correct to express the other elements in the sentence negatively as well. However, in English, this is incorrect. In addition to sounding wrong (you can often hear the error if you read the sentence out loud), a double negative in English causes an error in logic, because two negatives cancel each other out and yield a positive. In fact, the wording of ballot measures is often criticized for confusing voters with double negatives.

Examples
John *doesn't need no [any]* assistance with his sales presentation. [Or *John needs no assistance with his sales presentation*.]
Jeri *could not find no [any]* reason to approve the request. [Or *Jeri could find no reason to approve the request*.]

Irregular Verbs

Most verbs represent the past with the addition of the suffix "ed," as in "ask" becomes "asked." Irregular verbs change a vowel or convert to another word when representing the past tense. Consider the irregular verb "to go"; the past tense is "went," not "goed."

Examples
The need *arised [arose]* to seek additional funding.
Katy *leaped [leapt]* onto the stage to introduce the presentation.

Commas in a Series

A comma is used to separate the items in a series, but in some writing styles the comma is omitted between the final two items of the series, where the conjunction joins the last and next-to-last items. The comma in this position is known as the "serial comma." The serial comma is typically required in academic writing and typically omitted in journalism. Other writers omit the serial comma if the final two items in the series have a closer logical connection than the other items. In business writing, you may use it or omit it according to the prevailing style in your organization or industry. Know your audience and be aware of the rule.

Examples
Lisa is an amazing wife, mother, teacher, *gardener, and editor*.
Lisa is an amazing wife, mother teacher, *gardener and editor*.
Lisa is an amazing teacher, editor, gardener, *wife and mother*.

Faulty Comparisons

When comparing two objects by degree, there should be no mention of "est," as in "biggest" as all you can really say is that one is bigger than the other. If you are comparing three or more objects, then "est" will accurately communicate which is the "biggest" of them all.

Examples
Between the twins, Mackenzie is the *fastest [faster]* of the two.
Among our three children, Mackenzie is the *tallest*.

Dangling Modifiers

Modifiers describe a subject in a sentence or indicate how or when the subject carried out the action. If the subject is omitted, the modifier intended for the subject is left dangling or hanging out on its own without a clear relationship to the sentence. Who is doing the seeing in the first sentence?

Examples
Seeing the light at the end of the tunnel, celebrations were in order.
Seeing the light at the end of the tunnel, *we decided* that celebrations were in order.

Misplaced Modifiers

Modifiers that are misplaced are not lost, they are simply in the wrong place. Their unfortunate location is often far from the word or words they describe, making it easy for readers to misinterpret the sentence.

Examples
Trying to avoid the deer, *the tree hit my car*.
My car hit the tree when I tried to avoid a deer in the road.

Key Takeaway

By revising for format, facts, names, spelling, punctuation, and grammar, you can increase your chances of correcting many common errors in your writing.

Exercises

1. Select a news article from a news Web site, newspaper, or magazine. Find as many facts in the article as you can that could require fact-checking. Then check as many of these facts as you can, using sources available to you in the library and on the Internet. Did you find any errors in the article? Discuss your findings with your classmates.
2. Find an example of an assertion without attribution and share it with classmates.
3. Find an example of an error in a published document and share it with classmates.
4. Interview a coworker or colleague and specifically ask them to share a story where an error got past them during the revision process and made it to print or publication. How did they handle it? How much time did it take to correct? What did they learn from the experience? Compare your results with classmates.

References

- Strunk, W., Jr., & White, E. B. (1979). *The elements of style* (3rd ed.). New York, NY: Macmillian.
- Wyrick, J. (2008). *Steps to writing well* (10th ed.). Boston, MA: Thomson Wadsworth.

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2.3.3: Style Revisions

Learning Objectives

1. Discuss and demonstrate the use of twelve points to consider for style revisions.

You know the difference between cloudy and clear water, but can you tell when your writing is cloudy, when meaning is hidden in shadows, when the message you are trying to communicate is obscured by the style you use to present it? Water filtration involves removing particulates, harmful inorganic and organic materials, and clarifying the water. In the same way, the revision process requires filtration. You may come across word choices you thought were appropriate at the time or notice words you thought you wrote but are absent, and the revision process will start to produce results. Some words and sentence constructions will be harmful to the effective delivery and require attention. Some transitions fail to show the connections between thoughts and need to be changed.

Another way of conceptualizing the revision process in general and the clarifying process specifically is the common reference to a diamond in the rough. Like muddy water, diamonds do not come to have significant value until they have had their rough edges removed, have received expert polish, and been evaluated for clarity. Your attention to this important process will bring the value quotient of your writing up as it begins to more accurately communicate intended meaning. As we've discussed before, now is not the time to lose momentum. Just the opposite, now is the time to make your writing shine.

Here we will discuss several strategies to help clarify your writing style. If you have made wise word choices, the then next step to clarifying your document is to take it sentence by sentence. Each sentence should stand on its own, but each sentence is also interdependent on all other sentences in your document. These strategies will require significant attention to detail and an awareness of grammar that might not be your area of strength, but the more you practice them the more they will become good habits that will enhance your writing.

Break Up Long Sentences

By revising long sentences you can often increase the overall clarity of your document. To do this, let's start off with one strategy that will produce immediate results. Count the number of conjunctions in your document. Word processing programs will often perform a search for a specific a word and for our use, "and" will do just fine. Simple sentences often become compound and complex through the use of the word "and." The further the subject, the action, and the modifiers or descriptions are from one another is directly related to the complexity of the sentence, increasing the probability of reader error and misunderstandings. Look for the word "and" and evaluate whether the sentence has two complete thoughts or ideas. Does it try to join two dissimilar ideas or ones better off on their own?

In prose, and your expository writing classes, you may have learned that complex sentences can communicate emotions, settings, and scenes that evoke a sense of place and time with your reading audience. In business writing, our goals aim more toward precision and the elimination of error; a good business document won't read like a college essay. A professor may have advised you to avoid short, choppy writing. Are we asking you to do something along those lines? No. Choppy writing is hard to follow, but simple, clear writing does the job with a minimum of fuss and without decoration.

In their best-selling book *The Elements of Style*, William Strunk Jr. and E. B. White emphasize clarity as a central goal. However, the following is one of their rules: "Do not break sentences in two." As effective business writers we would agree with this rule, and while it may seem to contradict the preceding paragraph, let's consider what they mean by that rule. They encourage writers to avoid sentence fragments by refraining from using a period where the sentence needs a comma. That means that an independent clause should be connected to a dependent clause when necessary, and as we've discussed previously, a comma and a conjunction are appropriate for the task. The sentence fragment cannot stand alone, so we would agree with the rule as written.

But we would also qualify its use: when you have two long and awkward independent clauses that form an unwieldy sentence, it may indeed be better to divide the clauses into two independent sentences. Your skill as a business writer is required to balance the needs of the sentence to communicate meaning with your understanding of audience expectations, and clarity often involves concise sentences.

Revise Big Words and Long Phrases

Big words can clutter your writing with needless jargon that may be a barrier to many readers. Even if you know your audience has significant education and training in a field, you may need to include definitions and examples as effective strategies to communicate meaning. Don't confuse simple writing with simplistic writing. Your task will almost certainly not require an elementary approach for new readers, but it may very well require attention to words and the degree to which they contribute to, or detract from, the communication of your intended message. Long noun sequences, often used as descriptive phrases, can be one example of how writing can reduce clarity. If you need to describe a noun, use a phrase that modifies the noun clearly, with commas to offset for example, to enhance clarity.

Another long phrase to watch out for is often located in the introduction. Long preambles can make the sentence awkward and will require revision. Sentences that start with "It is" or "There are" can often be shortened or made clearer through revision.

Evaluate Long Prepositional Phrases

A prepositional phrase is a phrase composed of a preposition (a "where" word; a word that indicates location) and its object, which may be a noun, a pronoun, or a clause. Some examples of simple prepositional phrases include "with Tom," "before me," and "inside the building security perimeter."

Prepositional phrases are necessary—it would be difficult to write without them—but some add to the bottom line word count without adding much to the sentence. Bureaucratic writing often uses this technique in an attempt to make a sentence sound important, but the effort usually has the undesirable dual effects of obscuring meaning and sounding pompous.

Examples
The 1040 Form will *in all certainty* serve the majority of our customers.
The 1040 Form will *certainly* serve the majority of our customers.

The revision places an adverb in place of a long prepositional phrase and allows for a reduction in the word count while strengthening the sentence.

Delete Repetitious Words

Some level of repetition is to be expected and can be beneficial. It is also important to be consistent in your use of words when precise terminology is appropriate. However, needless repetition can make your document less than vigorous and discourage readers. For example, use of the word "said" when attributing dialogue is acceptable a couple of times, but if it is the only word you use, it will lose its impact quickly. People can "indicate," "point out," "share," and "mention" as easily as they can "say" words or phrases. Synonyms are useful in avoiding the boredom of repetition.

Eliminate Archaic Expressions or References

Some writing has been ritualized to the point of cliché and has lost its impact. For example, consider "Heretofore, we have discussed the goal of omitting needless words." *Heretofore* is an outdated word that could easily be cut from the previous sentence. Another example is "as per your request for documents that emphasize clarity and reduce reader error." Feel free to eliminate *as per your request* from your word choices.

Similar to outdated words and phrases, some references are equally outdated. While it is important to recognize leaders in a field, and this text does include references to pioneers in the field of communication, it also focuses on current research and concepts. Without additional clarification and examples, readers may not understand references to an author long since passed even though he or she made an important contribution to the field. For example, Shannon and Weaver pioneered the linear model of communication that revolutionized our understanding of interaction and contributed to computer interfaces as we know them today (McLean, 2005). However, if we mention them without explaining how their work relates to our current context, we may lose our readers. Similarly, references to films like *My Fair Lady* may well be less understood than the use of *The Princess Diaries* as an example of the transformative process the lead characters undergo, from rough, street-smart women to formally educated, polished members of the elite.

Avoid Fillers

Like, you know, like, you know what I mean, ahh, umm, and all the fillers you may use or hear in oral communication have, well, little or no place in the written representation of the spoken word. Review your writing for extra words that serve the written equivalent of "like" and omit them. They do not serve you as an author, and do not serve the reading audience.

Eliminate Slang

Many college professors can give examples of e-mails they have received from students that use all the modern characteristics of instant message and text abbreviation combined with a complete disregard for any norms of grammar or spelling, resulting in nearly incomprehensible messages. If your goal is to be professional, and the audience expectations do not include the use of slang, then it is inappropriate to include it in your document. Eliminate slang as you would a jargon term that serves as a barrier to understanding meaning. Not everyone will understand your slang word no more than they would a highly specialized term, and it will defeat your purpose. Norms for capitalization and punctuation that are routinely abandoned in efficient text messages or tweets are necessary and required in professional documents. Finally, there is no place in reputable business writing for offensive slang or profanity.

Evaluate Clichés

Clichés are words or phrases that through their overuse have lost their impact. That definition does not imply they have lost their meaning, and sometimes a well-placed cliché can communicate a message effectively. "Actions speak louder than words" is a cliché, but its five words speak volumes that many of your readers will recognize. This appeal to familiarity can be an effective strategy to communicate, but use it carefully. Excessive reliance on clichés will make your writing trite, while eliminating them altogether may not serve you well either. As an effective business writer, you will need to evaluate your use of clichés for their impact versus detraction from your message.

Emphasize Precise Words

Concrete words that are immediately available to your audience are often more effective than abstract terms that require definitions, examples, and qualifications. All these strategies have their place, but excessive use of abstractions will make your document less than precise, requiring additional clarification that can translate to work for you as the author and, more importantly, for your readers. Qualifiers deserve special mention here. Some instructors may indicate that words like "may," "seems," or "apparently" make your writing weak. Words are just words and it is how we use them that creates meaning. Some qualifiers are necessary, particularly if the document serves as record or may be the point of discussion in a legal issue. In other cases direct language is required, and qualifiers must be eliminated. Too many qualifiers can weaken your writing, but too few can expose you to liability. As a business writer, your understanding of audience expectations and assignment requirements will guide you to the judicious use of qualifiers.

Evaluate Parallel Construction

When you are writing in a series or have more than one idea to express, it is important to present them in similar ways to preserve and promote unity across your document. Parallel construction refers to the use of same grammatical pattern; it can be applied to words, phrases, and sentences. For example, "We found the seminar interesting, entertaining, and inspiring" is a sentence with parallel construction, whereas "We found the seminar interesting, entertaining, and it inspired us" is not. If your sentences do not seem to flow well, particularly when you read them out loud, look for misplaced parallels and change them to make the construction truly parallel.

Obscured Verbs

Business writing should be clear and concise. If the meaning is obscured, then revision is required. One common problem is the conversion of verbs into nouns with the addition of suffixes like: -ant,-ent, -ion, -tion, -sion, -ence, -ance, and ing. Instead of hiding meaning within the phrase "through the consolidation of," consider whether to use the verb forms "consolidated" or "consolidating." Similarly, instead of "the inclusion of," consider using "including," which will likely make the sentence more active and vigorous.

The “Is It Professional?” Test

Finally, when revising your document with an attention to detail, you simply need to ask the question: is it professional? If a document is too emphatic, it may seem like an attempt at cheerleading. If it uses too much jargon, it may be appropriate for “nerds” but may limit access to the information by a nontechnical audience. If the document appears too simplistic, it may seem to be “talking down” to the audience, treating the readers more like children than adults. Does your document represent you and your organization in a professional manner? Will you be proud of the work a year from now? Does it accomplish its mission, stated objectives, and the audience’s expectations? Business writing is not expository, wordy, or decorative, and the presence of these traits may obscure meaning. Business writing is professional, respectful, and clearly communicates a message with minimal breakdown.

Key Takeaway

Revising for style can increase a document’s clarity, conciseness, and professionalism.

Exercises

1. Which of the following sentences are examples of good business writing in standard English? For the sentences needing improvement, make revisions as you see fit and explain what was wrong with the original sentence. Discuss your results with your classmates.
    1. Caitlin likes gardening, golfing, hiking, and to swim.
    2. At any given point in time, well, there is a possibility that we could, like, be called upon for help.
    3. The evaluation of writing can be done through the examination and modification of each sentence.
    4. While in the meeting, the fire alarm rang.
    5. Children benefit from getting enough sleep, eating a balanced diet, and outdoor playtime.
    6. Yee has asked us to maximize the department’s ka-ching by enhancing the bling-bling of our merchandise; if we fail to do this the darn president may put the kibosh on our project.
    7. Ortega’s memo stated in no uncertain terms that all employees need to arrive for work on time every day.
    8. Although there are many challenges in today’s market and stock values have dropped considerably since last year, but we can hope to benefit from strategic thinking and careful decision making.
    9. If you are unable to attend the meeting, please let Steve or I know as soon as possible.
    10. One of the shipping containers are open.
2. Find an example of a good example of effective business writing, review it, and share it with your classmates.
3. Find an example of a bad example of effective business writing, review it, and share it with your classmates.
4. Revision requires attention to detail, and you may be under pressure to produce quality results within a deadline. How do you communicate your need for time for the revision process to those who are waiting on you to complete the document? Share and discuss your responses with your classmates.

References

McLean, S. (2005). *The basics of interpersonal communication*. Boston, MA: Allyn & Bacon.

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2.3.4: Evaluating the Work of Others

Learning Objectives

1. Describe five elements of critical analysis to use in evaluating someone else's writing.
2. Demonstrate how to deliver an evaluation constructively and respectfully.

As an experienced business writer, you may be called upon to review others' work. Having a clear understanding of the process will help you be efficient in your review, producing constructive advice that would benefit the essay while resisting change for change's sake.

Five Steps in Evalution

By following a sequence of orderly steps, you can increase the likelihood that your evaluation of someone else's writing will be fair, constructive, and useful. Below are the five steps in evaluation:

1. Understand the assignment.
2. Evaluate how well the writing carries out the assignment.
3. Evaluate assertions.
4. Check facts.
5. Look for errors.

First, review the instructions that were given to the writer. Make sure you understand the assignment and the target audience. What resources did the writer have access to, and how much time was allotted for completing the assignment? What purpose did the document need to fulfill, and what role will this document have in future business activities or decisions?

Second, evaluate how well the document fulfills its stated goals. As a reader, do you see the goals carried out in the document? If you didn't know the writer and you were to find the document next year in a file where you were searching for information, would it provide you with the information it aims to convey? For example, suppose the document refers to the sales history of the past five years. Does the writer provide the sales history for the reader's reference, or indicate where the reader can get this information?

Evaluate the assertions made in the document. An assertion is a declaration, statement, or claim of fact. Suppose the writer indicates that the sales history for the past five years is a significant factor. Does the writer explain why this history is significant? Is the explanation logical and sufficient?

Evaluate the facts cited in the document. Does the writer credit the sources of facts, statistics, and numbers? For example, suppose the writer mentions that the population of the United States is approximately three hundred million. Obviously, the writer did not count all U.S. residents to arrive at this number. Where did it come from? If you have access to sources where you can independently verify the accuracy of these details, look them up and note any discrepancies.

Finally, check the document for proper format and for errors in spelling, punctuation, and grammar. Word processing spell checkers do not catch all errors.

Delivering the Evaluation

If you are asked to evaluate someone else's written work, keep in mind that not everyone can separate process from product, or product from personality. Many authors, particularly those new to the writing process, see the written word as an extension of self. To help the recipient receive your evaluation as professional advice, rather than as personal criticism, use strategies to be tactful and diplomatic.

Until you know the author and have an established relationship, it is best to use "I" statements, as in "I find this sentence difficult to understand." The sentence places the emphasis on the speaker rather than the sentence, and further distances the author from the sentence. If you were to say, "This sentence is awful," all the author may hear is, "I am an awful writer" and fail to pay attention to your message, the sentence under examination, or ways to improve it. Business writing produces products, and all products can be improved, but not all authors can separate messenger from message.

Avoid the use of the word *you* in your evaluation, oral or written, as it can put the recipient on the defensive. This will inhibit listening and decrease the probability of effective communication (McLean, 2005). If you phrase an evaluation point as, "Why did you include this word here?" it can be interpreted as a personal attack. Just as speakers are often quite self-conscious of their public speaking abilities, writers are often quite attached to the works they have produced. Anticipating and respecting this relationship and the anxiety it sometimes carries can help you serve as a better evaluator.

Figure 2.3.4.1: To help the recipient receive your evaluation as professional advice, rather than as personal criticism, use strategies to be tactful and diplomatic. Julie Kertesz – Evaluation Contest Winner, detail – CC BY-NC-ND 2.0.

Phrasing disagreement as a question is often an effective response strategy. Let's rephrase that previous question to, "What is this sentence intended to communicate?" This places the emphasis on the sentence, not the author, and allows for dialogue. Phrasing your evaluation as a question emphasizes your need to understand, and provides the author with space to respond in a collaborative fashion.

Focus on the document as a product, an "it," and avoid associating the author or authors with it. There may be times when the social rank or status of the individual involved with work requires respectful consideration, and choosing to focus on the document as a work in progress, distinct from authors themselves, can serve you well. This also means that at times you may notice a glaring error but be reluctant to challenge the author directly as you anticipate a less than collaborative response. By treating the document as a product, and focusing on ways to strengthen it, keeping in mind our goals of clear and concise as reference points, you can approach issues without involving personalities.

Key Takeaway

When evaluating the work of others, make sure you understand the assignment, evaluate how well the writing carries out the assignment, evaluate assertions, check facts, and watch for errors. Deliver your evaluation with tact and diplomacy.

Exercises

1. Select a piece of writing from a Web site, book, newspaper, or magazine. Imagine that you are delivering an evaluation to the author of the piece. Using the strategies in this section, write a tactful and diplomatic critique. Your instructor may choose to make this a class exercise, asking students to exchange papers and evaluate each others' writing.
2. Select a piece of writing from a Web site, book, newspaper, or magazine. Imagine that you are editing it half its original length. Share the article and your revised copy with your classmates.
3. What responsibility do you have to point out the need for correction in a document when the author or team leader outranks you at work? Does it make a difference if you anticipate they will take the feedback negatively? How do you reconcile these concerns with your responsibility to the organization? Share and discuss your responses with your classmates.

References

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2.3.5: Proofreading and Design Evaluation

> **Learning Objectives**
>
> 1. Understand the difference between revising and proofreading, and how to use proofreading marks.
> 2. Describe six design elements for evaluation.

In traditional publishing, proofreading and design are the final stages a book undergoes before it is published. If the earlier steps of research, organizing, writing, revising, and formatting have been done carefully, proofreading and design should go smoothly. Now is not the time to go back and revise a document's content, or to experiment with changes in format. Instead, the emphasis is on catching any typographical errors that have slipped through the revision process, and "pouring" the format into a design that will enhance the writer's message.

Proofreading

By now you have completed a general and specific review of the document, with attention to detail. You may have made changes, and most word processing programs will allow you to track those changes across several versions and authors.

If you work in an environment where a document exists as a hard copy during the revision process, you may use or see handwritten proofreading symbols. Professional proofreaders often use standard markings that serve to indicate where changes needed to be made on a physical document. Some of today's word processing programs incorporate many proofreading symbols in their menus. It is useful to be familiar with the various proofreading marks that were traditionally used to review and revise hard copy documents. Even if you never use the symbols in a document, your awareness of them—and the points of emphasis under review—will serve you well. Do you need to insert a word, delete a word, capitalize a letter, or start a new paragraph? There are specific symbols for each of these actions because the review and revision process has common and consistent elements that need to be addressed.

Design Evaluation

If you are asked to review a document, design an element that deserves consideration. While most of our attention has focused on words (i.e., sentence construction and common errors), design can have a strong impact on the representation and presentation of information.

Framing

Framing refers to how information is presented, including margins, line justifications, and template expectations. Just as frame creates a border around a painting, highlighting part of the image while hiding the margins, the frame of a page influences how information is received. Margins create space around the edge and help draw attention to the content. One-inch margins are standard, but differences in margin widths will depend on the assignment requirements. A brief letter, for example, may have margins as wide as two inches so that the body of the letter fills up the stationery in a more balanced fashion. Template expectations are distinct from audience expectation, though they are often related. Most software programs have templates for basic documents, including letters, reports, and résumés.

Templates represent the normative expectations for a specific type of document. Templates have spaces that establish where a date should be indicated and where personal contact information should be represented. They also often allow you to "fill in the blank," reflecting each document's basic expectations of where information is presented.

For example, line justification involves where the text lines up on the page. Letters often have a left justify, lining up the text on the left side of the page while allowing the ends of each line on the right side to be "ragged," or not aligned. This creates even spaces between words and gives the appearance of organization while promoting white space, the space on the page free of text. Balance between text (often black) and white space creates contrast and allows for areas of emphasis. Left justify often produces the appearance of balance, as the words are evenly spaced, while left and right justify can produce large gaps between words, making the sentences appear awkward and hard to read.

Typefaces

Typeface refers to design of symbols, including letters and numbers *Kostelnick, 1998). The creation of the face of the type, as in a typing machine or printing press, has long been both an art and a science. In past centuries, carvings of the face of the type in copperplate, where ink was applied and then pressed to paper, created intricate and intriguing images designed to communicate style, prestige, status, and formality with the communication of words and symbols. We no longer use copper or hot lead type, but the typeface still exists as a medium for communication in addition to the word itself.

There are two general categories of typeface: serif and sans serif. “Sans” means without, so the emphasis here is on whether the face of the type has a serif or not. A serif is a small cross line, often perpendicular to the stroke of the letter, that is decorative but also serves the useful purpose of differentiating characters that could otherwise look similar (e.g., “m” and “rn,” “d” and “cl,” or “3” and “8”). For this reason, serif typefaces, such as Times New Roman and Garamond, are often easier to read, especially when the font size is small. Sans serif fonts, such as Arial and Helvetica, lack the serif and can be harder to read in long text sequences. They are most commonly used for headings. However, when text is to be read electronically (on the screen of a computer or other device), serifs can tend to break up, so sans serif typefaces can be a better choice.

The rule of thumb, or common wisdom, is to limit your document to two typefaces, contrasting sans serif (headings) with text (serif). Take care not to use a font that is hard to read, creating an unnecessary barrier for your reader. Also, use a font that conveys the tone of your professional message to enhance your effectiveness.

Paragraphs

Paragraphs are the basic organizational unit for presenting and emphasizing the key points in a document. Effective paragraphs can provide an effective emphasis strategy, but the placement within the page can also influence recall and impact. The first point presented is often the second in importance, the second point is the least important, and the third point in a series of three is often the most important. People generally recall the last point presented, and tend to forget or ignore the content in the middle of a sequence. Use this strategy to place your best point in the most appropriate location.

A lengthy document that consists of paragraph after paragraph can become monotonous, making reading a chore and obscuring pieces of information that need to stand out. To give the document visual variety and to emphasize key information, consider the following strategies:

- Bullets
- Numbers
- Boldface
- Italics
- Underlining
- Capitalization (all caps)

Remember, however, that using all caps (all capitals) for body text (as opposed to headings) is often considered rude, like shouting, particularly in electronic communications.

Visual Aids

If you have the luxury of including visual aids, such as graphics and pictures, in your document, take care to make sure that the verbal and visual messages complement each other. The visual should illustrate the text, and should be placed near the words so that the relationship is immediately clear. Sometimes during editing, a photograph will get pushed to the next page, leaving the relevant text behind and creating discontinuity. This creates a barrier for your reader, so avoid it if possible.

Designing Interactive Documents

Finally, documents increasingly have an interactivity component that can lead the reader in many directions. Providing links can facilitate interactivity, and that depth of resources can be a distinct advantage when writing documents to be read on a computer. However, be careful when integrating a web link within your document, as your audience may leave your message behind and not return. If you create a link associated with clicking on a photograph or icon, make sure that the scroll-over message is clear and communicates whether the reader will leave the current page. As we have seen in many design elements, there are strengths and weaknesses associated with each option and it requires a skilled business writer to create and deliver an effective message.

Key Takeaway

Proofreading and design put the finishing touches on a completed document.

Exercises

1. Using proofreading marks, mark the errors in the following paragraph:
2. With a writing assignment in draft form from your class, swap with a classmate and review the spelling, grammar, and punctuation, using proofreading marks where applicable.

References

Kostelnick, C., & Roberts, D. (1998). *Designing visual language: Strategies for professional communicators*. Needham Heights, MA: Allyn & Bacon.

2.3.6: Additional Resources

Online Writing Laboratory (OWL) at Purdue University provides a comprehensive guide to the revision process. OWL is open access, free, and an excellence resource for any writer. Please feel free to consult it anytime during our discussion to go more in depth on a grammatical point or writing tip. http://owl.english.purdue.edu/owl/resource/561/05

Visit this YourDictionary.com page for a useful article about punctuation marks. http://grammar.yourdictionary.com/punctuation/punctuation-rules-help.html

Visit this site for a useful list of irregular verbs in English. http://www.englishpage.com/irregularverbs/irregularverbs.html

This site from Capital Community College in Connecticut provides a menu of English grammar resources. grammar.ccc.commnet.edu/grammar

EnglishClub.com is dedicated to English learners and those for whom English is a second language—but it can be useful for all of us. http://www.englishclub.com/grammar

The original (1918) edition of the famous style guide *The Elements of Style* is available online at Bartleby.com. http://www.bartleby.com/141

The Writers and Editors site presents an article on tact and tone in editing the work of others. http://www.writersandeditors.com/tips_on_tact_and_tone_30805.htm

Merriam-Webster provides a chart of proofreader's marks and their meanings. www.merriam-webster.com/mw/table/proofrea.htm

Visit this About.com site for information on designing a document. http://desktoppub.about.com/od/designprinciples/Principles_of_Design.htm

For in-depth information on how to present visuals effectively, visit the Web site of Edward Tufte, a Professor Emeritus at Yale University, where he taught courses in statistical evidence, information design, and interface design. http://www.edwardtufte.com/tufte/index

For a wealth of articles and information about typefaces and other aspects of document design, explore the Web site of AIGA, the professional association for design. http://www.aiga.org/content.cfm/about

SECTION OVERVIEW

2.4: Writing in Business

2.4.1: Clarity

Learning Objectives

- Discuss strategies to improve clarity in writing

Word selection and phrasing leads to successfully transferring meaning from the sender to the receiver. Careful word selection enhances the writer's reputation and reflects the business's reputation grows.

Think of the advice a home seller receives before an open house. They will often 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 can have the same effect for the employee. The employee gains respect and appreciation because of writing skills that project credibility and confidence.

Precision

Business communication should be clear, specific, and precise meaning. Work to be accurate and careful with your word choice.

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 sound sophisticated. Unfortunately, using complex vocabulary may obscure your ideas and potentially damage your credibility. Remember the focus of your writing should be on the reader who needs to understand your message.

Instead of focusing on complex words concentrate on expressing accurate content with precise, unambiguous words so that the message is transmitted clearly. Be precise while understandable.

Avoid	Try
The lawyer was trying to obfuscate details during his opening speech.	The lawyer was trying to confuse the details during his opening.
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 of importance matters.

Avoid	Try	Why

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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2.4.2: Parallel Construction

Learning Objectives

- Evaluate the parallel structure of sentences and passages

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 end in "ing," whereas in the first sentence, two of the action words end in "ing" and one does not. While the meaning of the first sentence comes through, it's easy to trip up over the mismatched action words (or verbs).

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 different action words. To make them parallel, the sentences should be rewritten with the same types of action words. 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.

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 the example above, the sentences change when you get to the action words, after the word "to." Therefore, what comes after "to" is what your list should be made of in order to keep a parallel structure in your sentences. 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. *(The parallel elements of this sentence are independent clauses that could stand alone. We could makes sentences out of each*

clause before the comma.)

Juana looked for her phone *under* the table, *on* top of the bookcase, and *inside* the cupboard. *(The parallel elements are prepositional phrases, or words that indicate location, in this sentence.)*

Mandy and Torrence watched *The Godfather, Mary Poppins,* and a PBS documentary about pelicans. *(This may look tricky, but all of the elements in the list are nouns, or things, so the sentence is parallel.)*

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.

A link to an interactive elements can be found at the bottom of this page.

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2.4.3: Emphasis

Learning Objectives

- Discuss appropriate ways to indicate emphasis in business writing

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.

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2.4.4: Introduction to 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.

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2.4.5: Planning Business Messages

Learning Objectives

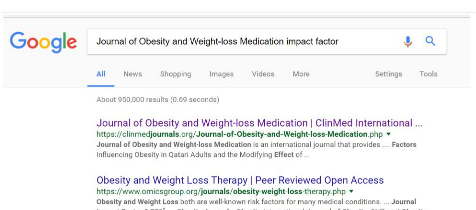
- Discuss the importance of the planning stage in the writing process

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.

The *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

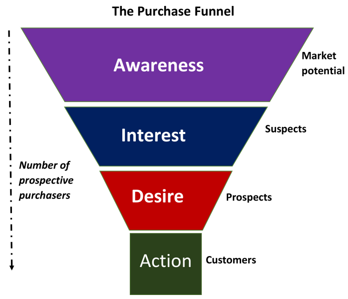
The generic organizational outline for a negative message uses the three blocks news, reasons, and goodwill and action. It uses these organizational blocks in a different order and also adds the buffer block. Remember this is the outline for writing the entire message (step 2 in the writing process). 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 the 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.***

Organization Section	Purpose	Notes to write message from….
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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2.4.6: Writing Business Messages

Learning Objectives

- Write a business message based on an outline using the appropriate components of a business message

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.

Avoid	Try	Why
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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2.4.7: Revising Business Messages

Learning Objectives

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

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

https://assessments.lumenlearning.co...sessments/8513

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

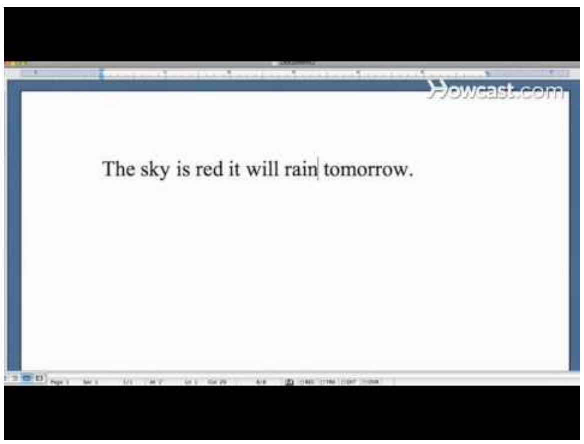
Fragments

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

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=108

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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2.4.8: Introduction to 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.

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2.4.9: Formatting Business Writing

Learning Objectives

- Discuss common guidelines to create a professionally formatted document

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

https://assessments.lumenlearning.co...sessments/8514

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[1]

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.

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1. Farnworth, Demian. "How To Dramatically Improve Your Writing With White Space." nd. Web. 13 June 2018. ↵

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2.4.10: Microsoft Word

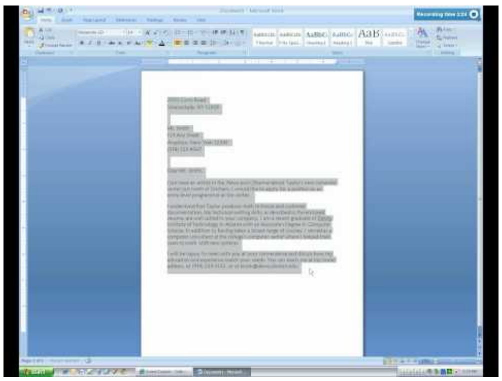
Learning Objectives

- Use Microsoft Word to create a visually appealing and accessible document

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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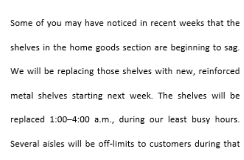
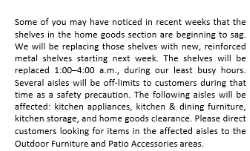
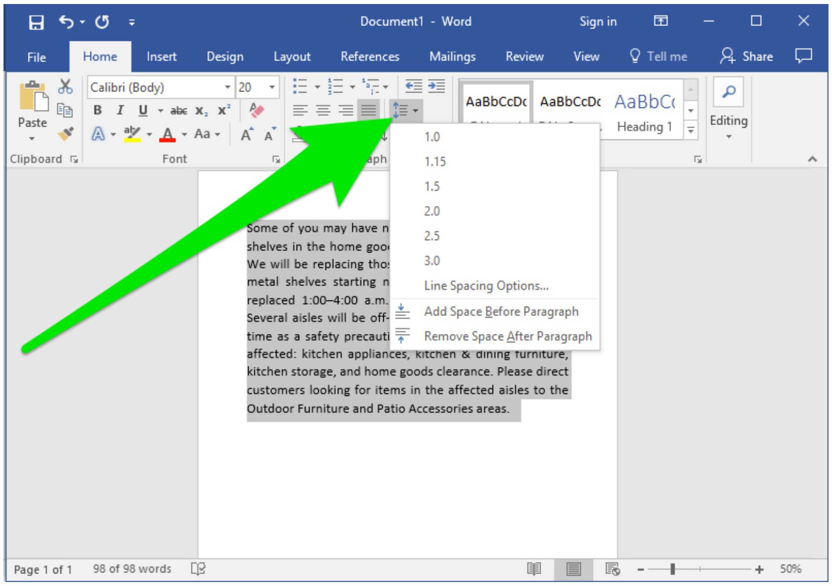
Line and Paragraph Spacing in Word

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.

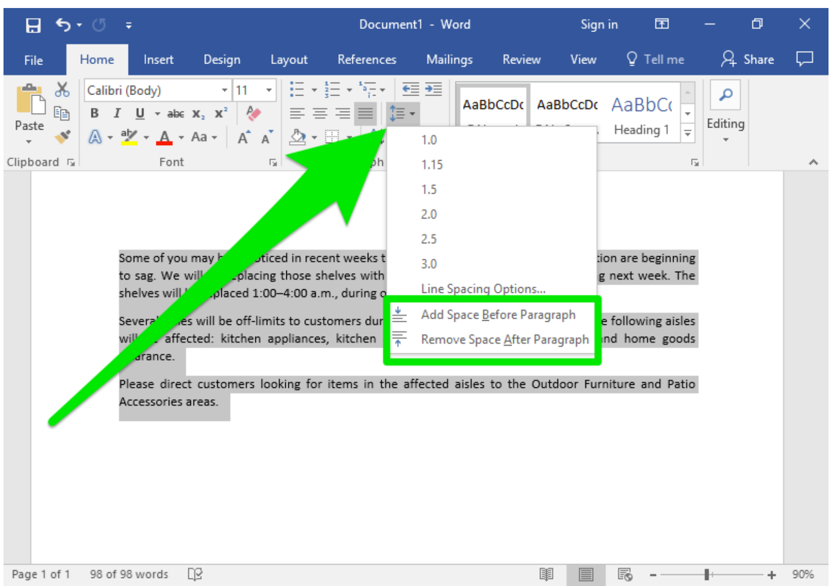
Avoid	Try
 Some of you may have noticed in recent weeks that the shelves in the home goods section are beginning to sag. We will be replacing those shelves with new, reinforced metal shelves starting next week. The shelves will be replaced 1:00–4:00 a.m., during our least busy hours. Several aisles will 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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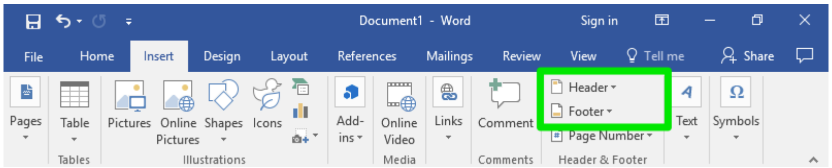
Headers and Footers

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.

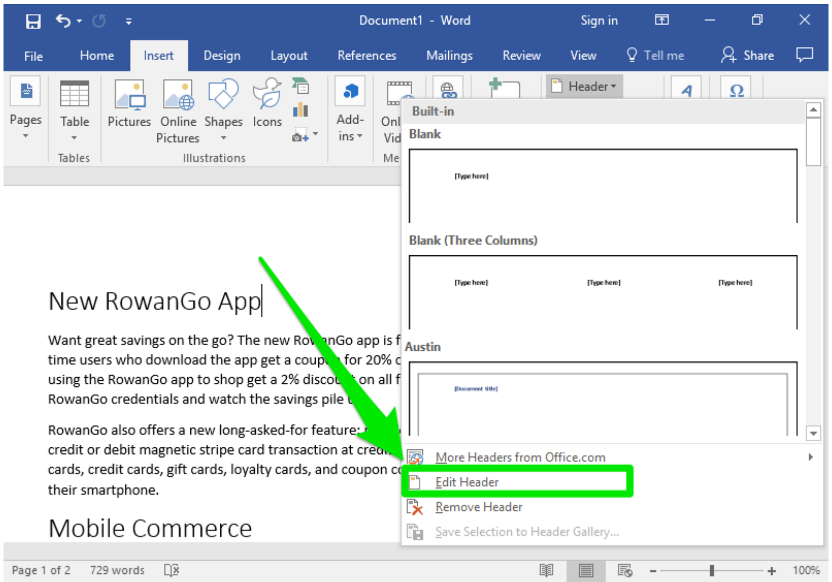
Your company likely has conventions and rules in place for the content of headers and footers and also for where page numbers are to be placed. There are, a few standard guidelines to note:

- 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.

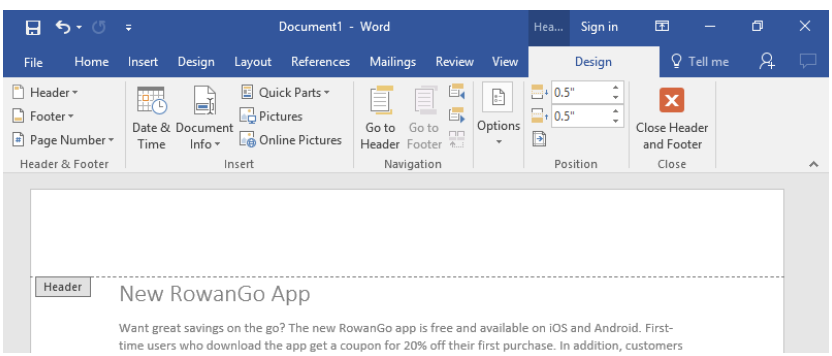


Figure 1. Header.

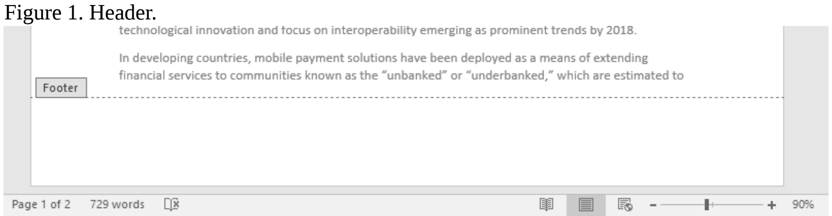


Figure 2. Footer.

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.

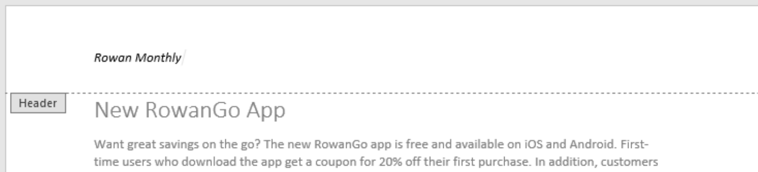


Figure 3. First page.

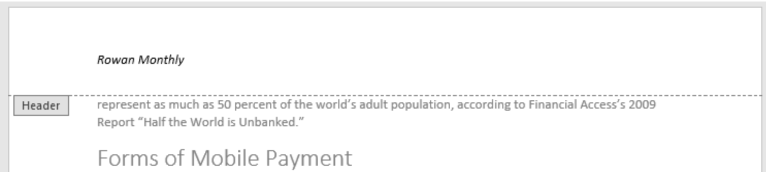


Figure 4. Second page.

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.

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2.4.11: 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. Do you see areas where he could improve this email?

Let’s dive in and learn the skills you need to ensure a much better outcome in your work.

Contributors and Attributions

2.4.12: Google Docs

Learning Objectives

- Use Google Docs to create a visually appealing and accessible document

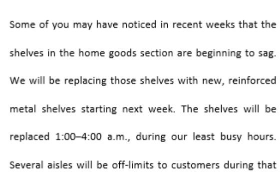
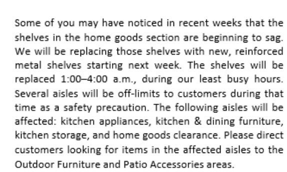
Working in Google Docs is similar to working in Microsoft Word. The only requirement is that you need a Google login to save and share your documents. This page provides guidance in how to use key features needed to create your business communication in Google Docs. If you can envision the page layout, 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: http://pb.libretexts.org/bcsfm/?p=116

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** > **Linespacing**.
4. Select a line spacing option.

Practice Question

https://assessments.lumenlearning.co...sessments/8516

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.

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.

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- How to create a document in Google Drive. **Authored by**: Ian Lamont. **Located at**: https://youtu.be/8kaHpcO7UXs. **License**: *CC BY: Attribution*

2.4.13: 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.

Contributors and Attributions

2.4.14: Assignment- Writing In Business- The Sushi Memo

Understanding the functions of interoffice memos is crucial when choosing the best communication channel in the workplace. Being able to analyze the audience and purpose of a scenario is an important skill to help you justify the necessity and effectiveness of a memo.

Let's explore a unique scenario in which a New York law firm asked a paralegal to find better options for sushi. This request lead to the paralegal conducting research and generating a three-page memo complete with footnotes. The memo became an urban legend after an article about it was published in the *New York Times.*

Your task is to read the *New York Times* article to help you write answers for the following questions:

1. Explain why many people may think this memo is a joke.
2. Did the writer choose the best delivery channel for this message?
3. When would you use a memo to deliver the sushi option message?

Be prepared to share your answers and findings in class during a follow-up discussion.

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**2 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**3 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**4 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**5 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**5 pts**
Content	**2 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**3 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**4 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Development – Critical Thinking	**4 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author’s opinion with no supporting evidence presented.	**6 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**8 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**10 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**10 pts**
Grammar, Mechanics, Style	**2 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**3 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**4 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**5 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader’s ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**5 pts**
				Total:	**25 pts**

Contributors and Attributions

2.4.15: Assignment- Writing In Business- Analyzing a Memo

Understanding the functions of interoffice memos is crucial when choosing the best communication channel in the workplace. Being able to analyze the audience and purpose of a scenario is an important skill to help you justify the necessity and effectiveness of a memo.

Download this memo, in which a university president addresses the employees at the university:

- Sample memo (.docx)
- Sample memo (PDF)

After reading the memo carefully answer the following questions:

1. Based on what we have read on audience and purpose in this module, describe your thoughts on the memo content and format.
2. Did the writer choose the best delivery channel for this message?
3. Are there any places you believe the writer could be more clear?

Be prepared to share your answers and findings in class during a follow-up discussion.

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**2 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**3 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**4 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**5 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**5 pts**
Content	**2 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**3 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**4 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Development – Critical Thinking	**4 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**6 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**8 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**10 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**10 pts**
Grammar, Mechanics, Style	**2 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**3 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**4 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**5 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**5 pts**
				Total:	**25 pts**

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2.4.16: Introduction to 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.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=80

Contributors and Attributions

2.4.17: Audience

Learning Objectives

- Explain the importance of audience to business communication

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.

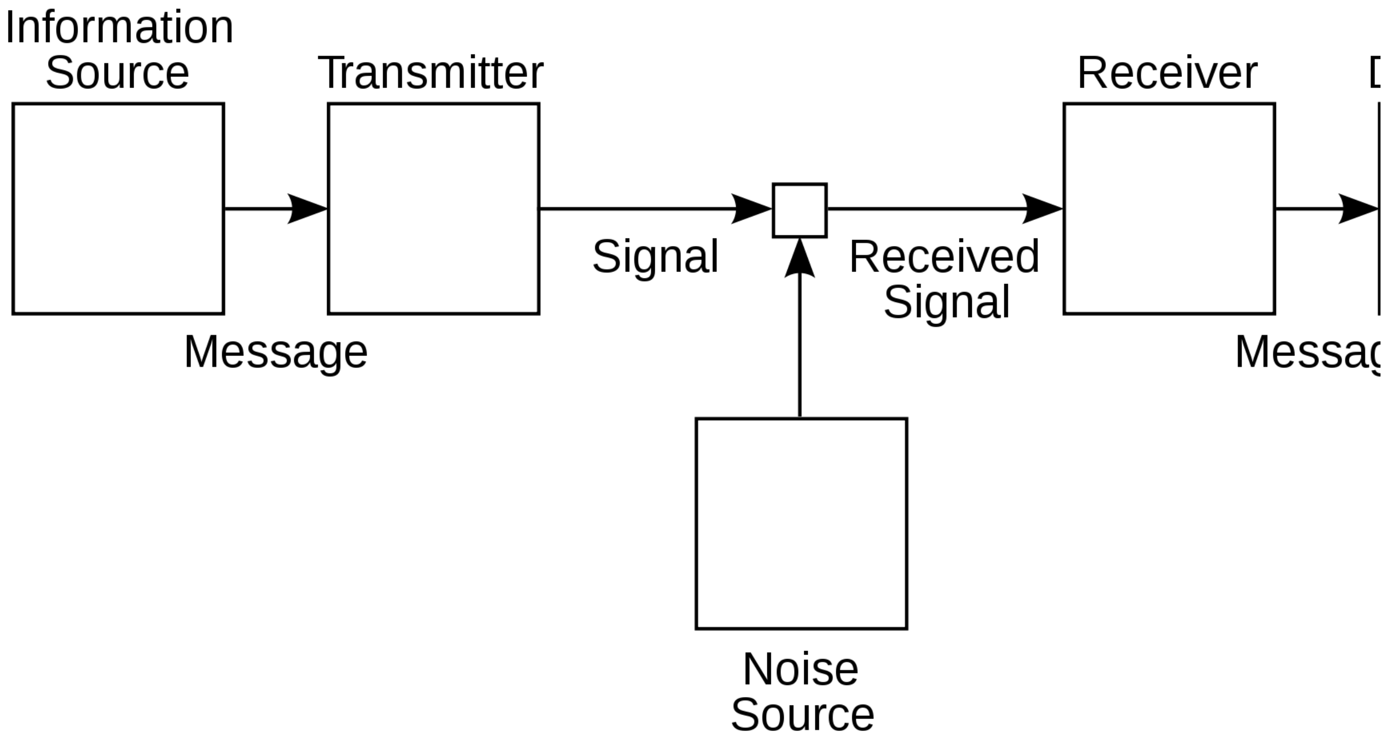


Figure 1. Shannon's diagram of a general communication system.

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

https://assessments.lumenlearning.co...sessments/8500

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.

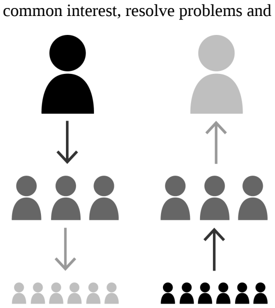


Figure 2. Upwards and downwards communication

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.

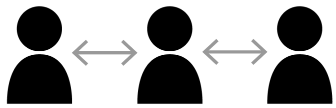


Figure 3. Horizontal communication

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.

2.4.18: The Right Message

Learning Objectives

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

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.

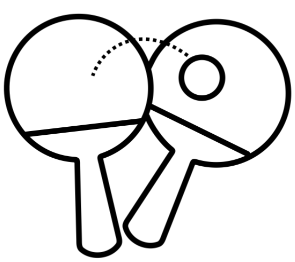
Management needs employee feedback on areas where some of the improvements could be delayed.

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

https://assessments.lumenlearning.co...sessments/8501

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

https://assessments.lumenlearning.co...sessments/8502

https://assessments.lumenlearning.co...sessments/8503

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2.4.19: Introduction to 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.

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2.4.20: Writing for the Reader

Learning Objectives

- Discuss strategies for creating reader-focused writing

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

A link to an interactive elements can be found at the bottom of this page.

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.

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

https://assessments.lumenlearning.co...sessments/8504

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2.4.21: Language as an Obstacle

Learning Objectives

- Discuss strategies to avoid language that can confuse or exclude readers

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."[1]

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."[2] 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 “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.

Avoid	Try
The month-end income statement showed a negative cash flow.	The month-end income statement showed a loss.

Practice Question

https://assessments.lumenlearning.co...sessments/8505

1. Merriam-Webster "Cliché." *Merriam-Webster.com*. n.d. Web. 12 June 2018. ↵
2. Merriam-Webster, "Jargon." *Merriam-Webster.com*. n.d. Web. 12 June 2018. ↵

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2.4.22: Bias-Free Writing

Learning Objectives

- Discuss strategies to avoid language that shows bias against individuals or populations

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.

Avoid	Try
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).[1]

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

https://assessments.lumenlearning.co...sessments/8506

A link to an interactive elements can be found at the bottom of this page.

1. The University of Chicago Press. "Grammar & Usage: Singular 'they'. *Chicago Manual of Style*, 2017, p. 241. ↵

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2.4.23: Concise Writing

Learning Objectives

- Discuss strategies to improve concision in 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. Sometimes your writing must balance the clarity of the message with efficiency.

Practice Question

https://assessments.lumenlearning.co...sessments/8507

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 its 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.

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. That said, the more complex the material you are discussing, the more straightforward and clean your sentences need to be.[1]

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?

Avoid	Try	Why
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.

A link to an interactive elements can be found at the bottom of this page.

Learn More

For more information on how and why to use the passive voice check out Using the Passive Voice.

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1. http://sites.utexas.edu/legalwriting/2015/04/29/manage-your-sentence-length-2/ ↵

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SECTION OVERVIEW

2.5: Written Communication

2.5.1: Email Chains and Listserv

Learning Objectives

- Discuss the use of email chains and listservs

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

https://assessments.lumenlearning.co...sessments/8526

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2.5.2: Instant Messaging and Text

Learning Objectives

- Compare different methods of instant messaging and text services

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

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.

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 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

https://assessments.lumenlearning.co...sessments/8527

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2.5.3: Multimedia Platforms and Social Media

Learning Objectives

- Identify professional applications of multimedia platforms
- Identify professional applications of social media networks

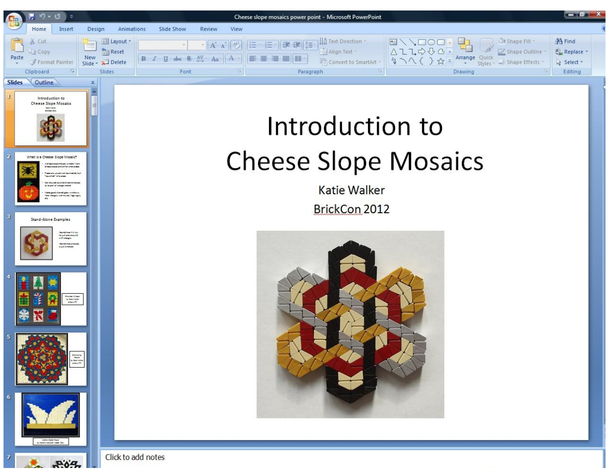
Multimedia is any content that uses a combination of different content forms such as text, audio, images, animations, video and interactive content. Multimedia can be recorded and played, displayed, interacted with or accessed by information content processing devices, such as computerized and electronic 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 is an example of a Starbucks customer relations blog and a Coca-Cola customer relations blog 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 quarter's 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

https://assessments.lumenlearning.co...sessments/8528

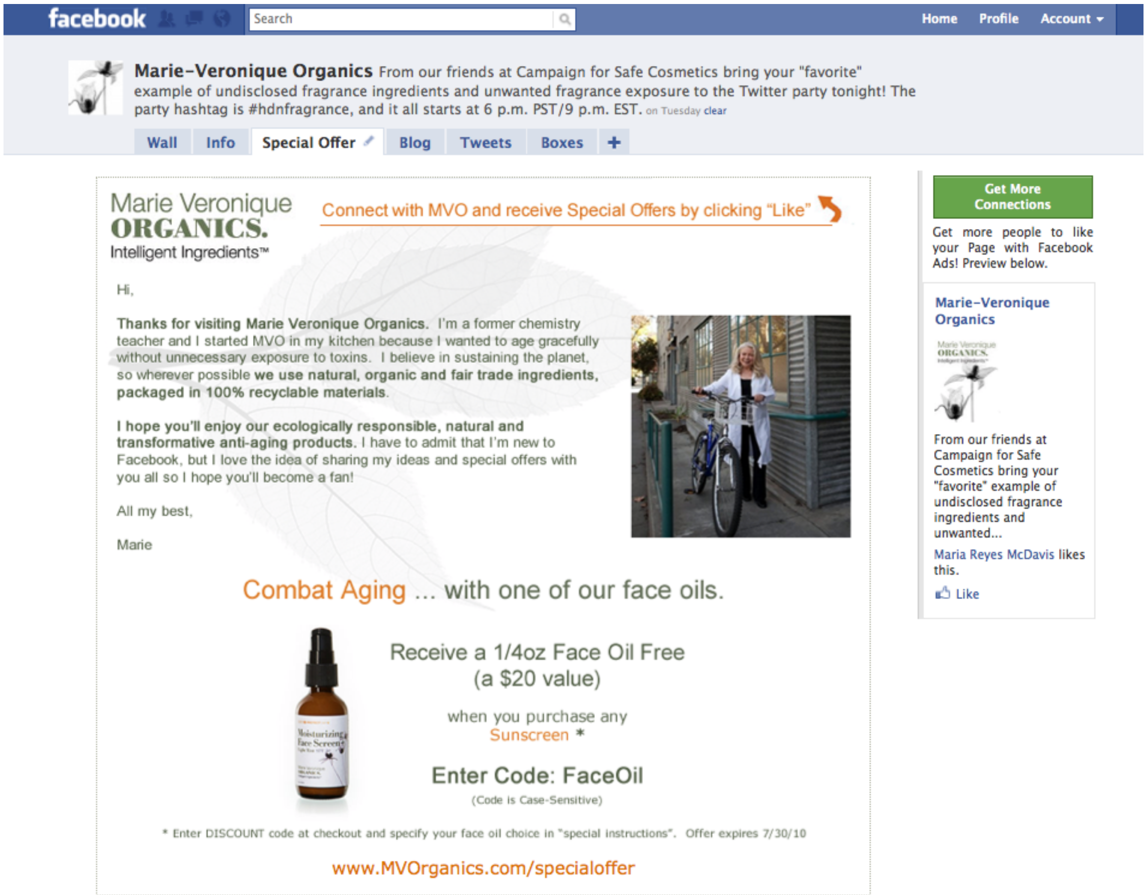
Social Media Networks

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

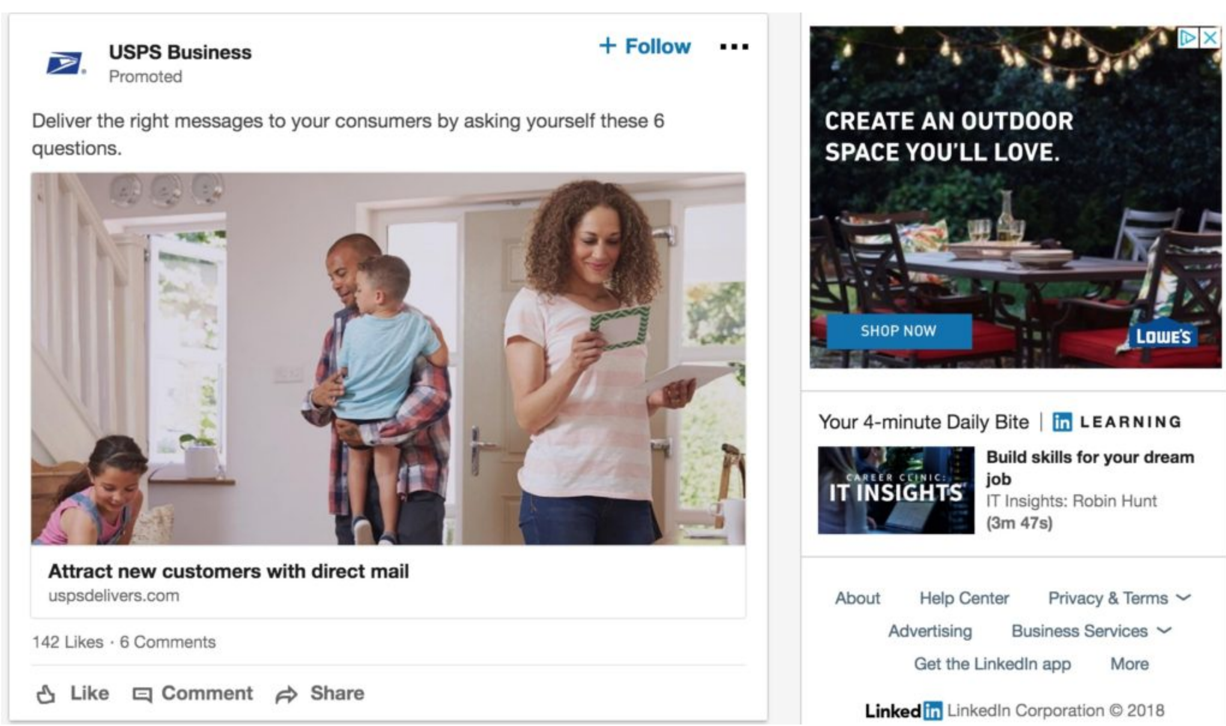
External Use

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.

Practice Question

https://assessments.lumenlearning.co...sessments/8529

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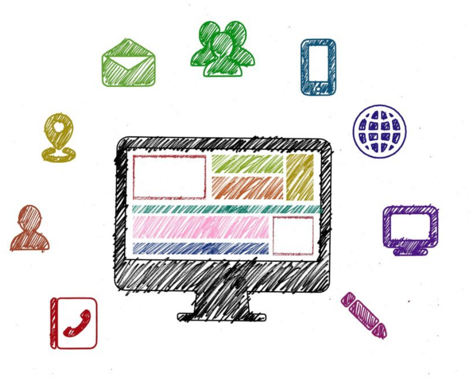
2.5.4: Introduction to External Communication

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?

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2.5.5: Types of External Emails

Learning Objectives

- Identify various 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

https://assessments.lumenlearning.co...sessments/8530

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2.5.6: Customer Emails

Learning Objectives

- 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

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 "10 Tips for Sending Better Customer Service Emails", an article from Groove about customer support software.

PRactice Question

https://assessments.lumenlearning.co...sessments/8531

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

https://assessments.lumenlearning.co...sessments/8532

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

https://assessments.lumenlearning.co...sessments/8533

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2.5.7: Introduction to 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?

Contributors and Attributions

2.5.8: Using the Right Communication Channel

Learning Objectives

- 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

https://assessments.lumenlearning.co...sessments/8534

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.

Contributors and Attributions

2.5.9: 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

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=160

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2.5.10: Assignment- Written Communication

You are a regional manager at the Walk-In Closet clothing store and you just received the most recent feedback from a mystery shopper's in-store experience report. One thing that caught your eye in this report is that the mystery shopper had a hard time identifying a staff member to help them get a changing room. They go on to mention that it was difficult to distinguish between who was a sales associate and who was a customer because there was no standard work uniform. This in not the first time you have read a comment like this. You decide it is time to take action by establishing a dress code for all staff. You are aware there may be some push back from the staff, but if you provide each employee with at least one Walk-In Closet shirt (short or long sleeve) the dress code transition may be easier.

Your task is to write a three-paragraph (minimum) memo addressed to the store managers in your region on the decision to implement an employee dress code program that will be fully implemented by the start of Q3. This memo will discuss the rational, benefits, costs, and time frame involved in executing the new dress code policy. Be sure to address the audience properly, and write to them as a concerned executive. You may also draw from your personal work experience with appropriate examples to support your references.

If you're not familiar with a Memo style, you can view a sample memo. (Note: Your memo does not need to contain every section included in the sample memo. Just be sure to include the date, recipient, sender, subject, and at least three paragraphs addressing the topic.)

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**4 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**6 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**8 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**10 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**10 pts**
Content	**4 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**6 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**8 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**10 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**10 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Development – Critical Thinking	**8 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**12 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**16 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**20 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**20 pts**
Grammar, Mechanics, Style	**4 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**6 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**8 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**10 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**10 pts**
				Total:	**50 pts**

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2.5.11: 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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2.5.12: Introduction to 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.

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2.5.13: Modernizing Business Messages

Learning Objectives

- Discuss the shift from traditional to modern communication methods

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

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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[1].

1. "The Global Impact of Remote Work," Remote.co, September 2016. ↵

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2.5.14: Digital versus Traditional Communication

Learning Objectives

- Identify benefits of digital communication methods
- Identify benefits of traditional communication methods

Digital Communication Methods

The benefits of digital communication for society in general are nicely stated by Mitchell Kapor[1]:

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. For example, 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 for anyone relaying information.

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

https://assessments.lumenlearning.co...sessments/8518

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

https://assessments.lumenlearning.co...sessments/8519

1. Kapor, Mitchell. *Electronic Frontier Foundation Information*, 1993. ↩

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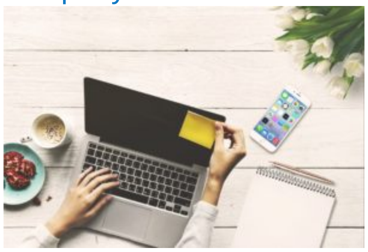
2.5.15: Introduction to Internal Emails and Memos

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?

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2.5.16: Internal Business Communication

Learning Objectives

- Describe the professional standards of intra-office emails

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

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2.5.17: Internal Emails

Learning Objectives

- Identify common types of internal emails
- Identify key features of the structure and format of internal emails
- Write an internal email

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

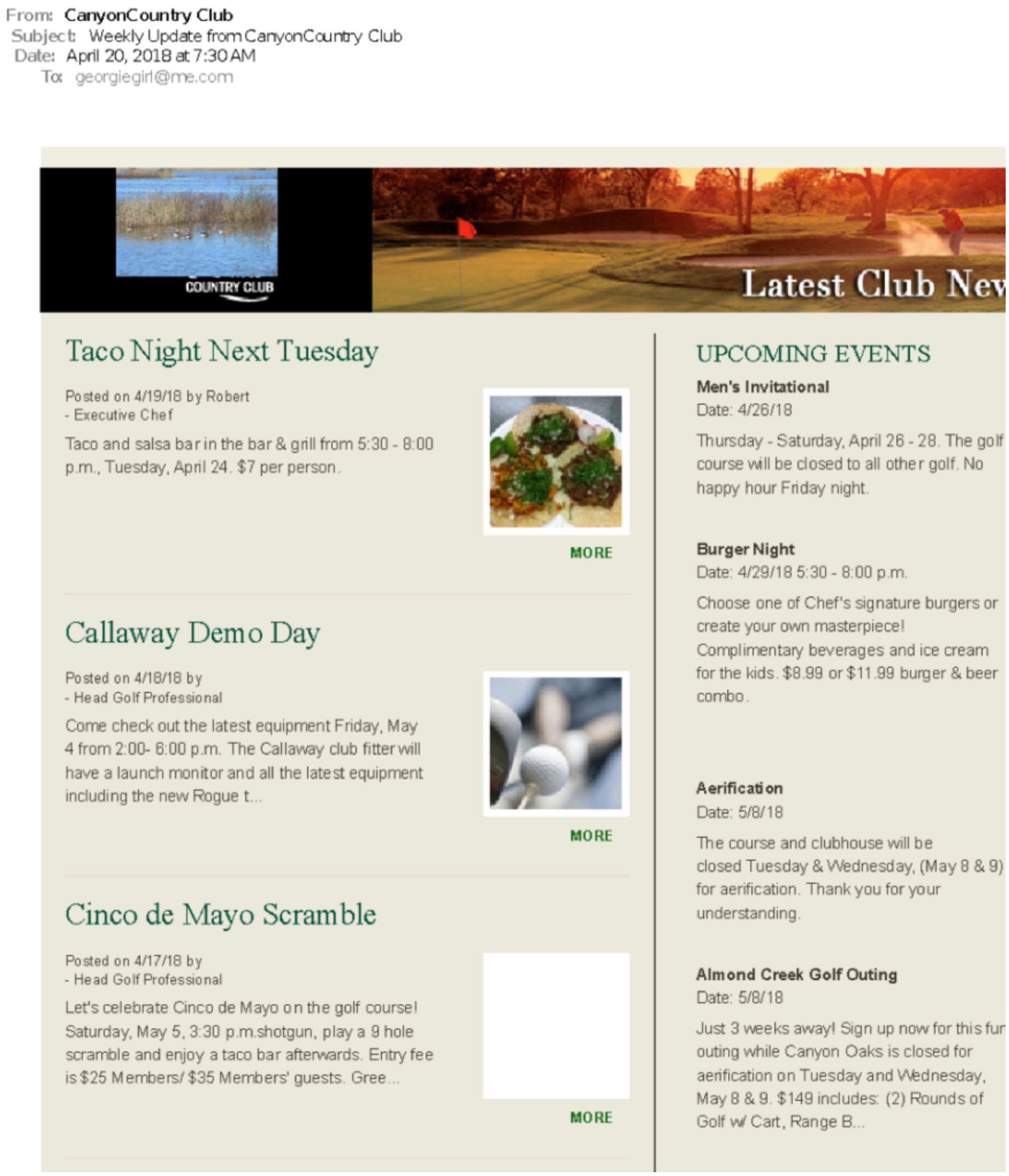
Hi Everyone,

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

COUNTRY CLUB

Latest Club Nev

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 fur 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

https://assessments.lumenlearning.co...sessments/8521

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

https://assessments.lumenlearning.co...sessments/8522

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

https://assessments.lumenlearning.co...sessments/8523

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.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=138

Contributors and Attributions

2.5.18: Memos

Learning Objectives

- Identify key features of the structure and format of memos
- Write an internal memo

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,

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

https://assessments.lumenlearning.co...sessments/8524

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

Not everyone needs to read every memo—and most people don’t want to sort through unnecessary mail—so you should be considerate when deciding who to send your memo to. 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.

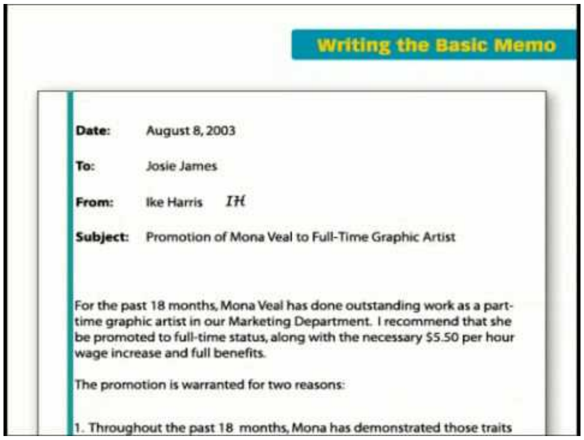
Take a minute to test your knowledge about writing memos. Click on the interactive below for more practice.

TRY IT

A link to an interactive elements can be found at the bottom of this page.

watch it

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



A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=140

Practice Question

https://assessments.lumenlearning.co...sessments/8525

Contributors and Attributions

2.5.19: Introduction to 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?

Contributors and Attributions

2.6: Gap

CHAPTER OVERVIEW

3: Business Messages, Technology, and Social Media

SECTION OVERVIEW

3.1: Business Writing in Action

Thumbnail: pixabay.com/photos/office-bu...ument-3295556/

3.1.1: Text, E-mail, and Netiquette

Learning Objectives

1. Discuss the role of text messaging in business communication.
2. Write effective e-mails for both internal and external communication.
3. Demonstrate the appropriate use of netiquette.

Text messages and e-mails are part of our communication landscape, and skilled business communicators consider them a valuable tool to connect. Netiquette refers to etiquette, or protocols and norms for communication, on the Internet.

Texting

Whatever digital device you use, written communication in the form of brief messages, or texting, has become a common way to connect. It is useful for short exchanges, and is a convenient way to stay connected with others when talking on the phone would be cumbersome. Texting is not useful for long or complicated messages, and careful consideration should be given to the audience.

It is often said that you can tell how old someone is by how he or she inputs a phone number on a cell phone. If the person uses his or her thumb while holding the digital device, that person may have been raised on video games and be adept at one-handed interfaces. If he holds the digital device with one hand and inputs the number with the other, he may be over thirty, or may be less comfortable with some technological devices. Of course, there is no actual correlation between input and age, but it is a useful example to use when considering who your audience is when writing a text message. If the person is a one-hander, and knows all the abbreviations common to texting, you may be able to use similar codes to communicate effectively. If the person is a two-hander, you are better off using fewer words and spelling them out. Texting can be a great tool for connecting while on the go, but consider your audience and your company, and choose words, terms, or abbreviations that will deliver your message.

Tips for Effective Business Texting

- Know your recipient; "? % dsct" may be an understandable way to ask a close associate what the proper discount is to offer a certain customer, but if you are writing a text to your boss, it might be wiser to write, "what % discount does Murray get on $1K order?"
- Anticipate unintentional misinterpretation. Texting often uses symbols and codes to represent thoughts, ideas, and emotions. Given the complexity of communication, and the useful but limited tool of texting, be aware of its limitation and prevent misinterpretation with brief messages.
- Contacting someone too frequently can border on harassment. Texting is a tool. Use it when appropriate but don't abuse it.
- Unplug yourself once in awhile. Do you feel constantly connected? Do you feel lost or "out of it" if you don't have your cell phone and cannot connect to people, even for fifteen minutes? Sometimes being unavailable for a time can be healthy—everything in moderation, including texting.
- Don't text and drive. Research shows that the likelihood of an accident increases dramatically if the driver is texting behind the wheel (Houston Chronicle, 2009). Being in an accident while conducting company business would reflect poorly on your judgment as well as on your employer.

E-mail

Electronic mail, usually called e-mail, is quite familiar to most students and workers. It may be used like text, or synchronous chat, and it can be delivered to a cell phone. In business, it has largely replaced print hard copy letters for external (outside the company) correspondence, as well as taking the place of memos for internal (within the company) communication (Guffey, 2008). E-mail can be very useful for messages that have slightly more content than a text message, but it is still best used for fairly brief messages.

Many businesses use automated e-mails to acknowledge communications from the public, or to remind associates that periodic reports or payments are due. You may also be assigned to "populate" a form e-mail in which standard paragraphs are used but you choose from a menu of sentences to make the wording suitable for a particular transaction.

E-mails may be informal in personal contexts, but business communication requires attention to detail, awareness that your e-mail reflects you and your company, and a professional tone so that it may be forwarded to any third party if needed. E-mail often serves to exchange information within organizations. Although e-mail may have an informal feel, remember that when used for business, it needs to convey professionalism and respect. Never write or send anything that you wouldn't want read in public or in front of your company president.

Tips for Effective Business E-mails

- Proper salutations should demonstrate respect and avoid mix-ups in case a message is accidentally sent to the wrong recipient. For example, use a salutation like "Dear Ms. X" (external) or "Hi Barry" (internal).
- Subject lines should be clear, brief, and specific. This helps the recipient understand the essence of the message. For example, "Proposal attached" or "Your question of 10/25."
- Close with a signature. Identify yourself by creating a signature block that automatically contains your name and business contact information.
- Avoid abbreviations. An e-mail is not a text message, and the audience may not find your wit cause to ROTFLOL (roll on the floor laughing out loud).
- Be brief. Omit unnecessary words.
- Use a good format. Include line breaks between sentences or divide your message into brief paragraphs for ease of reading. A good e-mail should get to the point and conclude in three small paragraphs or less.
- Reread, revise, and review. Catch and correct spelling and grammar mistakes before you press "send." It will take more time and effort to undo the problems caused by a hasty, poorly written e-mail than to get it right the first time.
- Reply promptly. Watch out for an emotional response—never reply in anger—but make a habit of replying to all e-mails within twenty-four hours, even if only to say that you will provide the requested information in forty-eight or seventy-two hours.
- Use "Reply All" sparingly. Do not send your reply to everyone who received the initial e-mail unless your message absolutely needs to be read by the entire group.
- Avoid using all caps. Capital letters are used on the Internet to communicate emphatic emotion or yelling and are considered rude.
- Test links. If you include a link, test it to make sure it is complete.
- E-mail ahead of time if you are going to attach large files (audio and visual files are often quite large) to prevent exceeding the recipient's mailbox limit or triggering the spam filter.
- Give feedback or follow up. If you don't get a response in twenty-four hours, e-mail or call. Spam filters may have intercepted your message, so your recipient may never have received it.

Let's look at two examples of business e-mail. In Figure $3.1.1.1$, we have an e-mail form. In Figure $3.1.1.2$, we have a letter written specifically for the situation and audience.

Netiquette

We create personal pages, post messages, and interact via mediated technologies as a normal part of our careers, but how we conduct ourselves can leave a lasting image, literally. The photograph you posted on your MySpace page may have been seen by your potential employer, or that nasty remark in a post may come back to haunt you later. Some fifteen years ago, when the Internet was a new phenomenon, Virginia Shea laid out a series of ground rules for communication online that continue to serve us today.

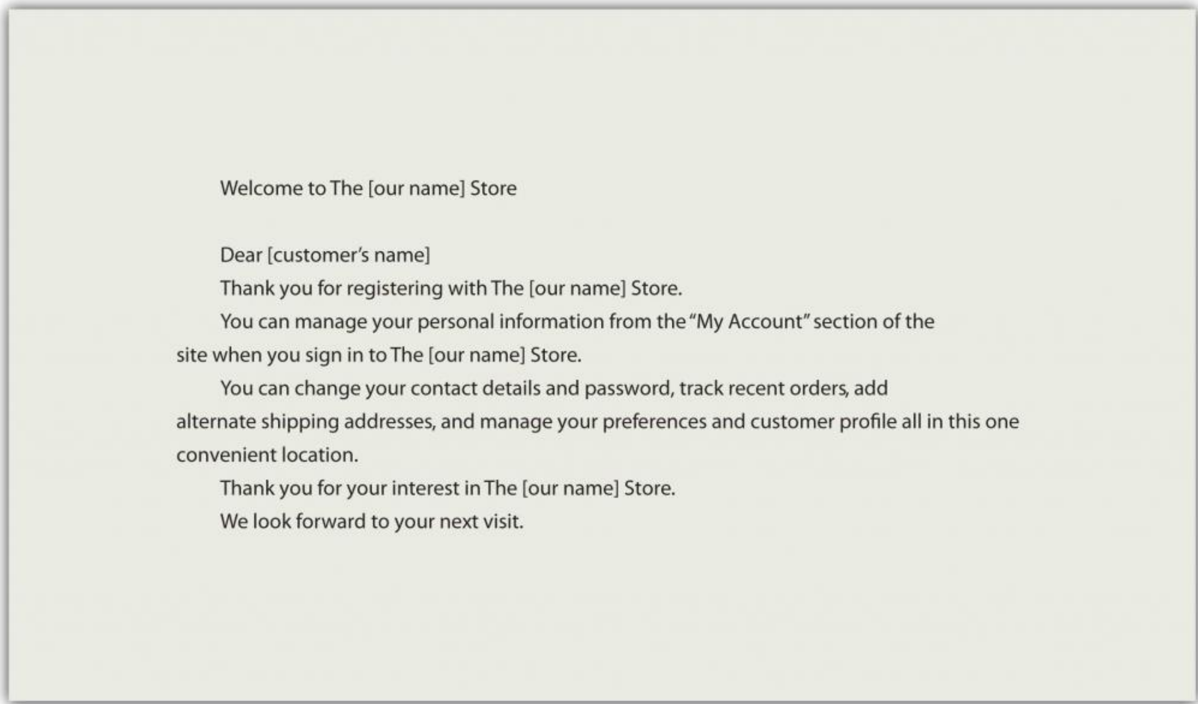
Virginia Shea's Rules of Netiquette

- Remember the human on the other side of the electronic communication.
- Adhere to the same standards of behavior online that you follow in real life.
- Know where you are in cyberspace.
- Respect other people's time and bandwidth.
- Make yourself look good online.
- Share expert knowledge.
- Keep flame wars under control.
- Respect other people's privacy.
- Don't abuse your power.
- Be forgiving of other people's mistakes (Shea, 1994).

Her rules speak for themselves and remind us that the golden rule (treat others as you would like to be treated) is relevant wherever there is human interaction.

Key Takeaways

- A text message is a brief written message sent and received using a digital device. It is useful for informal, brief, time-sensitive communication.
- E-mail is useful for both internal and external business communications. The content and formatting of an e-mail message should reflect professionalism and follow the rules of netiquette.
- Social customs that exist in traditional, live, human interaction also influence the rules and customs by which we interact with each other in the online environment.



Welcome to The [our name] Store

Dear [customer's name]

Thank you for registering with The [our name] Store.

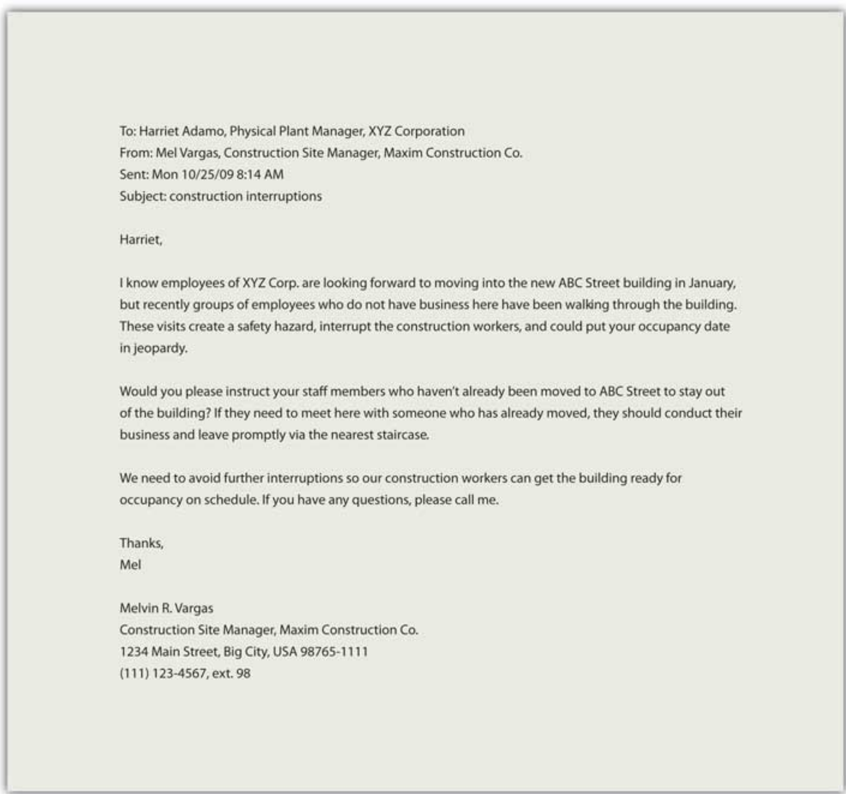
You can manage your personal information from the "My Account" section of the site when you sign in to The [our name] Store.

You can change your contact details and password, track recent orders, add alternate shipping addresses, and manage your preferences and customer profile all in this one convenient location.

Thank you for your interest in The [our name] Store.

We look forward to your next visit.

Figure 3.1.1.1



To: Harriet Adamo, Physical Plant Manager, XYZ Corporation
From: Mel Vargas, Construction Site Manager, Maxim Construction Co.
Sent: Mon 10/25/09 8:14 AM
Subject: construction interruptions

Harriet,

I know employees of XYZ Corp. are looking forward to moving into the new ABC Street building in January, but recently groups of employees who do not have business here have been walking through the building. These visits create a safety hazard, interrupt the construction workers, and could put your occupancy date in jeopardy.

Would you please instruct your staff members who haven't already been moved to ABC Street to stay out of the building? If they need to meet here with someone who has already moved, they should conduct their business and leave promptly via the nearest staircase.

We need to avoid further interruptions so our construction workers can get the building ready for occupancy on schedule. If you have any questions, please call me.

Thanks,
Mel

Melvin R. Vargas
Construction Site Manager, Maxim Construction Co.
1234 Main Street, Big City, USA 98765-1111
(111) 123-4567, ext. 98

Figure 3.1.1.2

Exercises

1. Write a text message in your normal use of language. It should use all your normal abbreviations (e.g., FWIW, IMHO, LOL), even if not everyone understands them.
2. Find an example of an e-mail that you wish you had never sent or received. Rewrite it to eliminate the characteristics that you find problematic. Share it with your classmates.
3. Choose at least three e-mails you have sent or received that are good examples of business communication. What makes them good examples? Could they be improved in any way? Share your suggestions with classmates.
4. When is e-mail inappropriate? Why?
5. Find a "flame war," or heated discussion in an online forum and note how it is handled. Compare the results with your classmates.

6. In your experience, how do people behave when they interact online? Share your observations with your classmates.

References

- Guffey, M. (2008). *Essentials of business communication* (7th ed.). Mason, OH: Thomson/Wadsworth.
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- Shea, V. (1994). *Netiquette*. San Francisco, CA: Albion Books.

3.1.2: Memorandums and Letters

Learning Objectives

- Discuss the purpose and format of a memo.
- Understand effective strategies for business memos.
- Describe the fifteen parts of a standard business letter.
- Access sample business letters and write a sample business letter.

Memos

A memo (or memorandum, meaning "reminder") is normally used for communicating policies, procedures, or related official business within an organization. It is often written from a one-to-all perspective (like mass communication), broadcasting a message to an audience, rather than a one-on-one, interpersonal communication. It may also be used to update a team on activities for a given project, or to inform a specific group within a company of an event, action, or observance.

Memo Purpose

A memo's purpose is often to inform, but it occasionally includes an element of persuasion or a call to action. All organizations have informal and formal communication networks. The unofficial, informal communication network within an organization is often called the grapevine, and it is often characterized by rumor, gossip, and innuendo. On the grapevine, one person may hear that someone else is going to be laid off and start passing the news around. Rumors change and transform as they are passed from person to person, and before you know it, the word is that they are shutting down your entire department.

One effective way to address informal, unofficial speculation is to spell out clearly for all employees what is going on with a particular issue. If budget cuts are a concern, then it may be wise to send a memo explaining the changes that are imminent. If a company wants employees to take action, they may also issue a memorandum. For example, on February 13, 2009, upper management at the Panasonic Corporation issued a declaration that all employees should buy at least $1,600 worth of Panasonic products. The company president noted that if everyone supported the company with purchases, it would benefit all (Lewis, 2009).

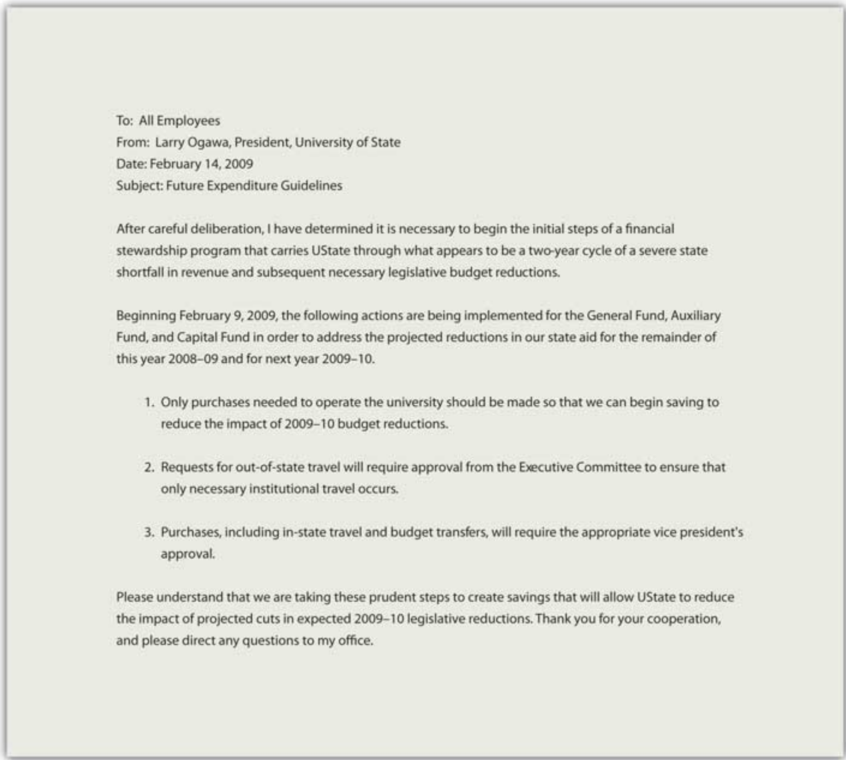
While memos do not normally include a call to action that requires personal spending, they often represent the business or organization's interests. They may also include statements that align business and employee interest, and underscore common ground and benefit.

Memo Format

A memo has a header that clearly indicates who sent it and who the intended recipients are. Pay particular attention to the title of the individual(s) in this section. Date and subject lines are also present, followed by a message that contains a declaration, a discussion, and a summary.

In a standard writing format, we might expect to see an introduction, a body, and a conclusion. All these are present in a memo, and each part has a clear purpose. The declaration in the opening uses a declarative sentence to announce the main topic. The discussion elaborates or lists major points associated with the topic, and the conclusion serves as a summary.

Let's examine a sample memo.



To: All Employees
From: Larry Ogawa, President, University of State
Date: February 14, 2009
Subject: Future Expenditure Guidelines

After careful deliberation, I have determined it is necessary to begin the initial steps of a financial stewardship program that carries UState through what appears to be a two-year cycle of a severe state shortfall in revenue and subsequent necessary legislative budget reductions.

Beginning February 9, 2009, the following actions are being implemented for the General Fund, Auxiliary Fund, and Capital Fund in order to address the projected reductions in our state aid for the remainder of this year 2008–09 and for next year 2009–10.

1. Only purchases needed to operate the university should be made so that we can begin saving to reduce the impact of 2009–10 budget reductions.
2. Requests for out-of-state travel will require approval from the Executive Committee to ensure that only necessary institutional travel occurs.
3. Purchases, including in-state travel and budget transfers, will require the appropriate vice president's approval.

Please understand that we are taking these prudent steps to create savings that will allow UState to reduce the impact of projected cuts in expected 2009–10 legislative reductions. Thank you for your cooperation, and please direct any questions to my office.

Figure 3.1.2.1

Five Tips for Effective Business Memos

Audience Orientation

Always consider the audience and their needs when preparing a memo. An acronym or abbreviation that is known to management may not be known by all the employees of the organization, and if the memo is to be posted and distributed within the organization, the goal is clear and concise communication at all levels with no ambiguity.

Professional, Formal Tone

Memos are often announcements, and the person sending the memo speaks for a part or all of the organization. While it may contain a request for feedback, the announcement itself is linear, from the organization to the employees. The memo may have legal standing as it often reflects policies or procedures, and may reference an existing or new policy in the employee manual, for example.

Subject Emphasis

The subject is normally declared in the subject line and should be clear and concise. If the memo is announcing the observance of a holiday, for example, the specific holiday should be named in the subject line—for example, use "Thanksgiving weekend schedule" rather than "holiday observance."

Direct Format

Some written business communication allows for a choice between direct and indirect formats, but memorandums are always direct. The purpose is clearly announced.

Objectivity

Memos are a place for just the facts, and should have an objective tone without personal bias, preference, or interest on display. Avoid subjectivity.

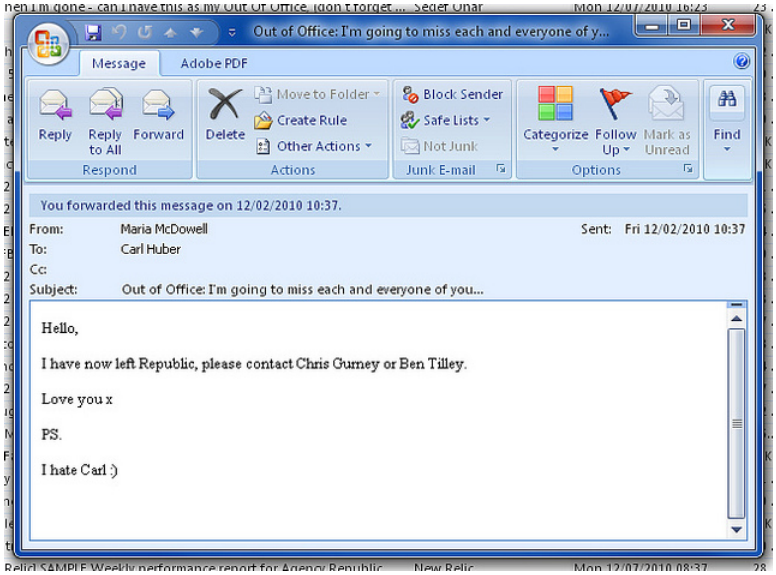


Figure 3.1.2.2: The words you choose represent you in your absence. Make sure they clearly communicate your message. wetwebwork – I probably shouldn't have called Maria the 4th best PM when she left… – CC BY 2.0.

Letters

Letters are brief messages sent to recipients that are often outside the organization (Bovee, C., & Thill, J., 2010). They are often printed on letterhead paper, and represent the business or organization in one or two pages. Shorter messages may include e-mails or memos, either hard copy or electronic, while reports tend to be three or more pages in length.

While e-mail and text messages may be used more frequently today, the effective business letter remains a common form of written communication. It can serve to introduce you to a potential employer, announce a product or service, or even serve to communicate feelings and emotions. We'll examine the basic outline of a letter and then focus on specific products or writing assignments.

All writing assignments have expectations in terms of language and format. The audience or reader may have their own idea of what constitutes a specific type of letter, and your organization may have its own format and requirements. This chapter outlines common elements across letters, and attention should be directed to the expectations associated with your particular writing assignment. There are many types of letters, and many adaptations in terms of form and content, but in this chapter, we discuss the fifteen elements of a traditional block-style letter.

Letters may serve to introduce your skills and qualifications to prospective employers, deliver important or specific information, or serve as documentation of an event or decision. Regardless of the type of letter you need to write, it can contain up to fifteen elements in five areas. While you may not use all the elements in every case or context, they are listed in Table 3.1.2.1.

Table 3.1.2.1: Elements of a Business Letter

Content	Guidelines
1. Return Address	This is your address where someone could send a reply. If your letter includes a letterhead with this information, either in the header (across the top of the page) or the footer (along the bottom of the page), you do not need to include it before the date.
2. Date	The date should be placed at the top, right or left justified, five lines from the top of the page or letterhead logo.
3. Reference (Re:)	Like a subject line in an e-mail, this is where you indicate what the letter is in reference to, the subject or purpose of the document.
4. Delivery (Optional)	Sometimes you want to indicate on the letter itself how it was delivered. This can make it clear to a third party that the letter was delivered via a specific method, such as certified mail (a legal requirement for some types of documents).
5. Recipient Note (Optional)	This is where you can indicate if the letter is personal or confidential.

Content	Guidelines
6. Salutation	A common salutation may be "Dear Mr. (full name)." But if you are unsure about titles (i.e., Mrs., Ms., Dr.), you may simply write the recipient's name (e.g., "Dear Cameron Rai") followed by a colon. A comma after the salutation is correct for personal letters, but a colon should be used in business. The salutation "To whom it may concern" is appropriate for letters of recommendation or other letters that are intended to be read by any and all individuals. If this is not the case with your letter, but you are unsure of how to address your recipient, make every effort to find out to whom the letter should be specifically addressed. For many, there is no sweeter sound than that of their name, and to spell it incorrectly runs the risk of alienating the reader before your letter has even been read. Avoid the use of impersonal salutations like "Dear Prospective Customer," as the lack of personalization can alienate a future client.
7. Introduction	This is your opening paragraph, and may include an attention statement, a reference to the purpose of the document, or an introduction of the person or topic depending on the type of letter. An emphatic opening involves using the most significant or important element of the letter in the introduction. Readers tend to pay attention to openings, and it makes sense to outline the expectations for the reader up front. Just as you would preview your topic in a speech, the clear opening in your introductions establishes context and facilitates comprehension.
8. Body	If you have a list of points, a series of facts, or a number of questions, they belong in the body of your letter. You may choose organizational devices to draw attention, such as a bullet list, or simply number them. Readers may skip over information in the body of your letter, so make sure you emphasize the key points clearly. This is your core content, where you can outline and support several key points. Brevity is important, but so is clear support for main point(s). Specific, meaningful information needs to be clear, concise, and accurate.
9. Conclusion	An emphatic closing mirrors your introduction with the added element of tying the main points together, clearly demonstrating their relationship. The conclusion can serve to remind the reader, but should not introduce new information. A clear summary sentence will strengthen your writing and enhance your effectiveness. If your letter requests or implies action, the conclusion needs to make clear what you expect to happen. It is usually courteous to conclude by thanking the recipient for his or her attention, and to invite them to contact you if you can be of help or if they have questions. This paragraph reiterates the main points and their relationship to each other, reinforcing the main point or purpose.
10. Close	"Sincerely" or "Cordially" are standard business closing statements. ("Love," "Yours Truly," and "BFF" are closing statements suitable for personal correspondence, but not for business.) Closing statements are normally placed one or two lines under the conclusion and include a hanging comma, as in Sincerely,
11. Signature	Five lines after the close, you should type your name (required) and, on the line below it, your title (optional).
12. Preparation Line	If the letter was prepared, or word-processed, by someone other than the signatory (you), then inclusion of initials is common, as in MJD or abc.
13. Enclosures/Attachments	Just like an e-mail with an attachment, the letter sometimes has additional documents that are delivered with it. This line indicates what the reader can look for in terms of documents included with the letter, such as brochures, reports, or related business documents.

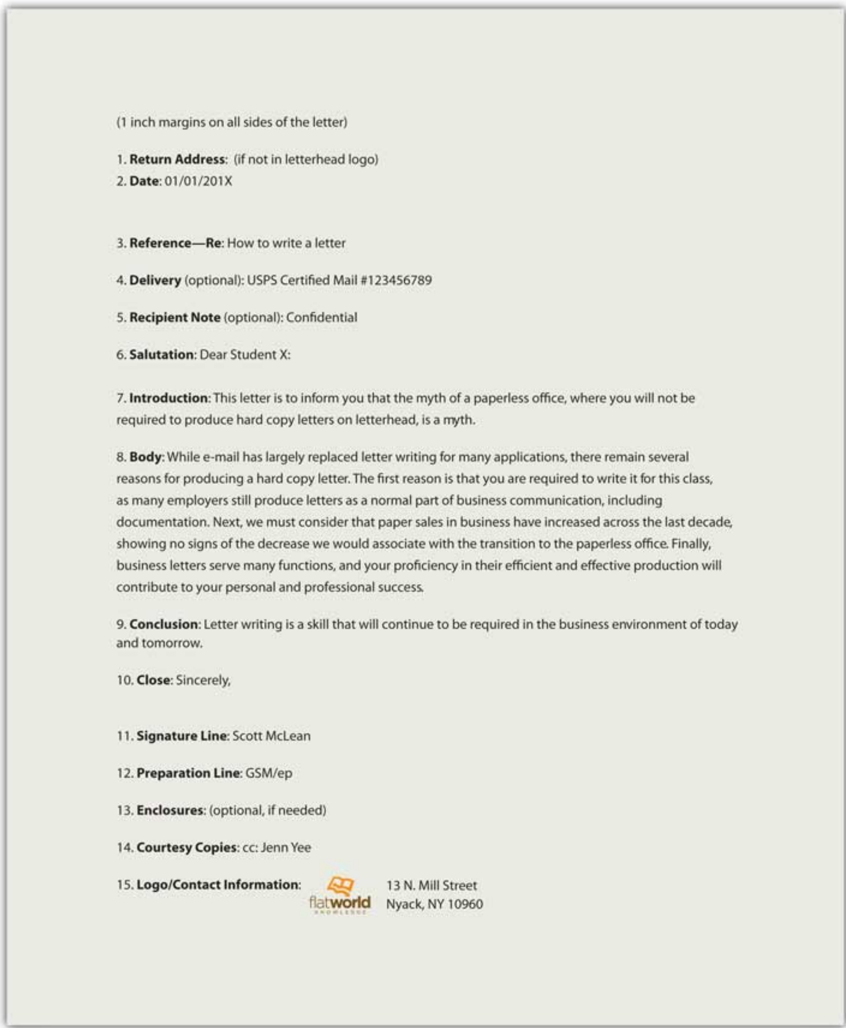
Content	Guidelines
14. Courtesy Copies or “CC”	The abbreviation “CC” once stood for carbon copies but now refers to courtesy copies. Just like a “CC” option in an e-mail, it indicates the relevant parties that will also receive a copy of the document.
15. Logo/Contact Information	A formal business letter normally includes a logo or contact information for the organization in the header (top of page) or footer (bottom of page).

Strategies for Effective Letters

Remember that a letter has five main areas:

1. The heading, which establishes the sender, often including address and date
2. The introduction, which establishes the purpose
3. The body, which articulates the message
4. The conclusion, which restates the main point and may include a call to action
5. The signature line, which sometimes includes the contact information

A sample letter is shown in Figure $3.1.2.3$



(1 inch margins on all sides of the letter)

1. **Return Address**: (if not in letterhead logo)
2. **Date**: 01/01/201X

3. **Reference—Re**: How to write a letter

4. **Delivery** (optional): USPS Certified Mail #123456789

5. **Recipient Note** (optional): Confidential

6. **Salutation**: Dear Student X:

7. **Introduction**: This letter is to inform you that the myth of a paperless office, where you will not be required to produce hard copy letters on letterhead, is a myth.

8. **Body**: While e-mail has largely replaced letter writing for many applications, there remain several reasons for producing a hard copy letter. The first reason is that you are required to write it for this class, as many employers still produce letters as a normal part of business communication, including documentation. Next, we must consider that paper sales in business have increased across the last decade, showing no signs of the decrease we would associate with the transition to the paperless office. Finally, business letters serve many functions, and your proficiency in their efficient and effective production will contribute to your personal and professional success.

9. **Conclusion**: Letter writing is a skill that will continue to be required in the business environment of today and tomorrow.

10. **Close**: Sincerely,

11. **Signature Line**: Scott McLean

12. **Preparation Line**: GSM/ep

13. **Enclosures**: (optional, if needed)

14. **Courtesy Copies**: cc: Jenn Yee

15. **Logo/Contact Information**: flatworld 13 N. Mill Street Nyack, NY 10960

Figure $3.1.2.3$: Sample Business Letter: Always remember that letters represent you and your company in your absence. In order to communicate effectively and project a positive image,

- be clear, concise, specific, and respectful;
- each word should contribute to your purpose;

- each paragraph should focus on one idea;
- the parts of the letter should form a complete message;
- the letter should be free of errors.

Key Takeaways

- Memos are brief business documents usually used internally to inform or persuade employees concerning business decisions on policy, procedure, or actions.
- Letters are brief, print messages often used externally to inform or persuade customers, vendors, or the public.
- A letter has fifteen parts, each fulfilling a specific function.

Exercises

1. Find a memo from your work or business, or borrow one from someone you know. Share it with your classmates, observing confidentiality by blocking out identifying details such as the name of the sender, recipient, and company. Compare and contrast.
2. Create a draft letter introducing a product or service to a new client. Post and share with classmates.
3. Write a memo informing your class that an upcoming holiday will be observed. Post and share with classmates.
4. Find a business letter (for example, an offer you received from a credit card company or a solicitation for a donation) and share it with your classmates. Look for common elements and points of difference.
5. Now that you have reviewed a sample letter, and learned about the five areas and fifteen basic parts of any business letter, write a business letter that informs a prospective client or customer of a new product or service.

References

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3.1.3: Business Proposal

Learning Objectives

1. Describe the basic elements of a business proposal.
2. Discuss the main goals of a business proposal.
3. Identify effective strategies to use in a business proposal.

An effective business proposal informs and persuades efficiently. It features many of the common elements of a report, but its emphasis on persuasion guides the overall presentation.

Let's say you work in a health care setting. What types of products or services might be put out to bid? If your organization is going to expand and needs to construct a new wing, it will probably be put out to bid. Everything from office furniture to bedpans could potentially be put out to bid, specifying a quantity, quality, and time of delivery required. Janitorial services may also be bid on each year, as well as food services, and even maintenance. Using the power of bidding to lower contract costs for goods and services is common practice.

In order to be successful in business and industry, you should be familiar with the business proposal. Much like a report, with several common elements and persuasive speech, a business proposal makes the case for your product or service. Business proposals are documents designed to make a persuasive appeal to the audience to achieve a defined outcome, often proposing a solution to a problem.

Common Proposal Elements

Idea

Effective business proposals are built around a great idea or solution. While you may be able to present your normal product, service, or solution in an interesting way, you want your document and its solution to stand out against the background of competing proposals. What makes your idea different or unique? How can you better meet the needs of the company that other vendors? What makes you so special? If the purchase decision is made solely on price, it may leave you little room to underscore the value of service, but the sale follow-through has value. For example, don't consider just the cost of the unit but also its maintenance. How can maintenance be a part of your solution, distinct from the rest? In addition, your proposal may focus on a common product where you can anticipate several vendors at similar prices. How can you differentiate yourself from the rest by underscoring long-term relationships, demonstrated ability to deliver, or the ability to anticipate the company's needs? Business proposals need to have an attractive idea or solution in order to be effective.

Traditional Categories

You can be creative in many aspects of the business proposal, but follow the traditional categories. Businesses expect to see information in a specific order, much like a résumé or even a letter. Each aspect of your proposal has its place and it is to your advantage to respect that tradition and use the categories effectively to highlight your product or service. Every category is an opportunity to sell, and should reinforce your credibility, your passion, and the reason why your solution is simply the best.

Table 3.1.3.1: Business Proposal Format

Cover Page	Title page with name, title, date, and specific reference to request for proposal if applicable.
Executive Summary	Like an abstract in a report, this is a one- or two-paragraph summary of the product or service and how it meets the requirements and exceeds expectations.
Background	Discuss the history of your product, service, and/or company and consider focusing on the relationship between you and the potential buyer and/or similar companies.
Proposal	The idea. *Who*, *what*, *where*, *when*, *why*, and *how*. Make it clear and concise. Don't waste words, and don't exaggerate. Use clear, well-supported reasoning to demonstrate your product or service.

Market Analysis	What currently exists in the marketplace, including competing products or services, and how does your solution compare?
Benefits	How will the potential buyer benefit from the product or service? Be clear, concise, specific, and provide a comprehensive list of immediate, short, and long-term benefits to the company.
Timeline	A clear presentation, often with visual aids, of the process, from start to finish, with specific, dated benchmarks noted.
Marketing Plan	Delivery is often the greatest challenge for Web-based services—how will people learn about you? If you are bidding on a gross lot of food service supplies, this may not apply to you, but if an audience is required for success, you will need a marketing plan.
Finance	What are the initial costs, when can revenue be anticipated, when will there be a return on investment (if applicable)? Again, the proposal may involve a one-time fixed cost, but if the product or service is to be delivered more than once, and extended financial plan noting costs across time is required.
Conclusion	Like a speech or essay, restate your main points clearly. Tie them together with a common them and make your proposal memorable.

Ethos, Pathos, and Logos

Ethos refers to credibility, pathos to passion and enthusiasm, and logos to logic or reason. All three elements are integral parts of your business proposal that require your attention. Who are you and why should we do business with you? Your credibility may be unknown to the potential client and it is your job to reference previous clients, demonstrate order fulfillment, and clearly show that your product or service is offered by a credible organization. By association, if your organization is credible the product or service is often thought to be more credible.

In the same way, if you are not enthusiastic about the product or service, why should the potential client get excited? How does your solution stand out in the marketplace? Why should they consider you? Why should they continue reading? Passion and enthusiasm are not only communicated through "!" exclamation points. Your thorough understanding, and your demonstration of that understanding, communicates dedication and interest.

Each assertion requires substantiation, each point clear support. It is not enough to make baseless claims about your product or service—you have to show why the claims you make are true, relevant, and support your central assertion that your product or service is right for this client. Make sure you cite sources and indicate "according to" when you support your points. Be detailed and specific.

Professional

A professional document is a base requirement. If it is less than professional, you can count on its prompt dismissal. There should be no errors in spelling or grammar, and all information should be concise, accurate, and clearly referenced when appropriate. Information that pertains to credibility should be easy to find and clearly relevant, including contact information. If the document exists in a hard copy form, it should be printed on a letterhead. If the document is submitted in an electronic form, it should be in a file format that presents your document as you intended. Word processing files may have their formatting changed or adjusted based on factors you cannot control—like screen size—and information can shift out of place, making it difficult to understand. In this case, a portable document format (PDF)—a format for electronic documents—may be used to preserve content location and avoid any inadvertent format changes when it is displayed.

Effective, persuasive proposals are often brief, even limited to one page. "The one-page proposal has been one of the keys to my business success, and it can be invaluable to you too. Few decision-makers can ever afford to read more than one page when deciding if they are interested in a deal or not. This is even more true for people of a different culture or language," said Adnan Khashoggi, a successful multibillionaire (Riley, 2002). Clear and concise proposals serve the audience well and limit the range of information to prevent confusion.

Two Types of Business Proposals

Solicited

If you have been asked to submit a proposal it is considered solicited. The solicitation may come in the form of a direct verbal or written request, but normally solicitations are indirect, open-bid to the public, and formally published for everyone to see. A request for proposal (RFP), request for quotation (RFQ), and invitation for bid (IFB) are common ways to solicit business proposals for business, industry, and the government.

RFPs typically specify the product or service, guidelines for submission, and evaluation criteria. RFQs emphasize cost, though service and maintenance may be part of the solicitation. IRBs are often job-specific in that they encompass a project that requires a timeline, labor, and materials. For example, if a local school district announces the construction of a new elementary school, they normally have the architect and engineering plans on file, but need a licensed contractor to build it.

Unsolicited

Unsolicited proposals are the "cold calls" of business writing. They require a thorough understanding of the market, product and/or service, and their presentation is typically general rather than customer-specific. They can, however, be tailored to specific businesses with time and effort, and the demonstrated knowledge of specific needs or requirement can transform an otherwise generic, brochure-like proposal into an effective sales message. Getting your tailored message to your target audience, however, is often a significant challenge if it has not been directly or indirectly solicited. Unsolicited proposals are often regarded as marketing materials, intended more to stimulate interest for a follow-up contact than make direct sales. Sue Baugh and Robert Hamper encourage you to resist the temptation to "shoot at every target and hope you hit at least one" (Baugh, L. S., and Hamper, R. J., 1995). A targeted proposal is your most effective approach, but recognize the importance of gaining company, service, or brand awareness as well as its limitations.

Sample Business Proposal

The Writing Help Tools Center is a commercial enterprise, and offers a clear (and free) example of a business proposal here:

www.writinghelp-central.com/sample-business-proposal.html

Key Takeaway

Business proposals need to target a specific audience.

Exercises

1. Prepare a business proposal in no more than two pages. Do not include actual contact information. Just as the example has employees named after colors, your (imaginary) company should have contact information that does not directly link to real businesses or you as an individual. Do not respond to point 12.
2. Search for an RFP (request for proposal) or similar call to bid, and post it to your class. Compare the results with your classmates, focusing on what is required to apply or bid.
3. Identify a product or service you would like to produce or offer. List three companies that you would like to sell your product or service to and learn more about them. Post your findings, making the link between your product or service and company needs. You may find the Web site on creating a business plan (https://www.scu.edu/mobi/business-courses/starting-a-business/session-2-the-business-plan/#3) useful when completing this exercise

References

- Baugh, L. S., & Hamper, R. J. (1995). *Handbook for writing proposals* (p. 3). New York, NY: McGraw-Hill.
- Riley, P. G. (2002). *The one-page proposal: How to get your business pitch onto one persuasive page* (p. 2). New York, NY: HarperCollins.

3.1.4: Report

Learning Objectives

1. Discuss the main parts of a report.
2. Understand the different types of reports.
3. Write a basic report.

What Is a Report?

Reports are documents designed to record and convey information to the reader. Reports are part of any business or organization; from credit reports to police reports, they serve to document specific information for specific audiences, goals, or functions. The type of report is often identified by its primary purpose or function, as in an accident report, a laboratory report, a sales report, or even a book report. Reports are often analytical, or involve the rational analysis of information. Sometimes they simply "report the facts" with no analysis at all, but still need to communicate the information in a clear and concise format. Other reports summarize past events, present current data, and forecast future trends. While a report may have conclusions, propositions, or even a call to action, the demonstration of the analysis is the primary function. A sales report, for example, is not designed to make an individual sale. It is, however, supposed to report sales to date, and may forecast future sales based on previous trends. This chapter is designed to introduce you to the basics of report writing.

Figure 3.1.4.1: Choose a type of report by its function, and display the information in a vivid way that is easily understood. Pixabay – CC0 public domain.

Types of Reports

Reports come in all sizes, but are typically longer than a page and somewhat shorter than a book. The type of report depends on its function. The function of the report is its essential purpose, often indicated in the thesis or purpose statement. The function will also influence the types of visual content or visual aids, representing words, numbers, and their relationships to the central purpose in graphic, representational ways that are easy for the reader to understand. The function may also contribute to parameters like report length (page or word count) or word choice and readability. "Focusing on the content of your longer business documents is not only natural but necessary because doing so helps ensure complete, correct information" (Bovee, C., and Thill, J., 2010).

Reports vary by function, and they also vary by style and tradition. Within your organization, there may be employer-specific expectations that need to be addressed to meet audience expectations. This chapter discusses reports in general terms, focusing on common elements and points of distinction, but reference to similar documents where you work or additional examination of specific sample reports may serve you well as you prepare your own report.

Informational or Analytical Report?

There are two main categories for reports, regardless of their specific function or type. An informational report informs or instructs and presents details of events, activities, individuals, or conditions without analysis. An example of this type of "just the facts" report is a police accident report. The report will note the time, date, place, contributing factors like weather, and identification information for the drivers involved in an automobile accident. It does not establish fault or include judgmental statements. You should not see "Driver was falling down drunk" in a police accident report. Instead, you would see "Driver failed sobriety tests and breathalyzer test and was transported to the station for a blood sample." The police officer is not a trained medical doctor and is therefore not licensed to make definitive diagnoses, but can collect and present relevant information that may contribute to that diagnosis.

The second type of report is called an analytical report. An analytical report presents information with a comprehensive analysis to solve problems, demonstrate relationships, or make recommendations. An example of this report may be a field report by a Center for Disease Control (CDC) physician from the site of an outbreak of the H1N1 virus, noting symptoms, disease progression, steps taken to arrest the spread of the disease, and to make recommendations on the treatment and quarantine of subjects.

Table $3.1.4.3$includes common reports that, depending on the audience needs, may be informational or analytical.

Table $3.1.4.1$: Types of Reports and Their Functions

Type	Function
1. Laboratory Report	Communicate the procedures and results of laboratory activities
2. Research Report	Study problems scientifically by developing hypotheses, collecting data, analyzing data, and indicating findings or conclusions
3. Field Study Report	Describe one-time events, such as trips, conferences, seminars, as well as reports from branch offices, industrial and manufacturing plants
4. Progress Report	Monitor and control production, sales, shipping, service, or related business process
5. Technical Report	Communication process and product from a technical perspective
6. Financial Report	Communication status and trends from a finance perspective
7. Case Study	Represent, analyze, and present lessons learned from a specific case or example
8. Needs Assessment Report	Assess the need for a service or product
9. Comparative Advantage Report	Discuss competing products or services with an analysis of relative advantages and disadvantages
10. Feasibility Study	Analyze problems and predict whether current solutions or alternatives will be practical, advisable, or produced the desired outcome(s)
11. Instruction Manuals	Communicate step-by-step instructions on the use of a product or service
12. Compliance Report	Document and indicate the extent to which a product or service is within established compliance parameters or standards
13. Cost-Benefit Analysis Report	Communicate costs and benefits of products or services.
14. Decision Report	Make recommendations to management and become tools to solve problems and make decisions
15. Benchmark Report	Establish criteria and evaluate alternatives by measuring against the establish benchmark criteria
16. Examination Report	Report or record data obtained from an examination of an item or conditions, including accidents and natural disasters
17. Physical Description report	Describe the physical characteristics of a machine, a device, or object
18. Literature Review	Present summaries of the information available on a given subject

How Are Reports Organized?

Reports vary by size, format, and function. You need to be flexible and adjust to the needs of the audience while respecting customs and guidelines. Reports are typically organized around six key elements:

1. Whom the report is about and/or prepared for
2. What was done, what problems were addressed, and the results, including conclusions and/or recommendations
3. Where the subject studied occurred
4. When the subject studied occurred

5. Why the report was written (function), including under what authority, for what reason, or by whose request
6. How the subject operated, functioned, or was used

Pay attention to these essential elements when you consider your stakeholders, or those who have an interest in the report. That may include the person(s) the report is about, whom it is for, and the larger audience of the business, organization, or industry. Ask yourself who the key decision makers are who will read your report, who the experts or technicians will be, and how executives and workers may interpret your words and images. While there is no universal format for a report, there is a common order to the information. Each element supports the main purpose or function in its own way, playing an important role in the representation and transmission of information.

Table 3.1.4.2: Ten Common Elements of a Report

Page	Element	Function	Example
1. Cover	Title and image	Like the cover of a book, sometimes a picture, image, or logo is featured to introduce the topic to the reader.	
2. Title Fly	Title only	This page is optional.	Feasibility Study of Oil Recovery from the X Tarpit Sands Location
3. Title Page	Label, report, features title, author, affiliation, date, and sometimes for whom the report was prepared		Feasibility Study of Oil Recovery from the X Tarpit Sands Location Peak Oilman, X Energy Corporation Prepared for X
4. Table of Contents	A list of the main parts of the report and their respective page numbers		• Abstract……1 • Introduction……2 • Background……3
5. Abstract	• Informational abstract: highlight topic, methods, data, and results • Descriptive abstract: (All of the above without statements of conclusion or recommendations)		This report presents the current status of the X tarpit sands, the study of oil recoverability, and the findings of the study with specific recommendations.
6. Introduction	Introduces the topic of the report		*Oil sands recovery* processes include ways to extract and separate the bitumen from the clay, *sand*, and water that make up the tar *sands. This study analyzes the feasibility of extraction and separation, including a comprehensive cost/benefits analysis, with specific recommendations*.
7. Body	Key elements of body include: • Background • Methodology • Results • Analysis and Recommendations		• Background: History of oil extraction and separation from tarpit sands. • Methodology: Specific analysis of the site based on accepted research methods. • Results: Data from the feasibility study. • Analysis and Recommendations: Analysis of the data and recommendations based on that analysis.

Page	Element	Function	Example
8. Conclusion	Concise presentation of findings	This portion clearly indicates the main results and their relation to recommended action or outcome.	
9. References	Bibliography or Works Cited	This part contains a list of citations.	
10. Appendix	Related supporting materials	This may include maps, analysis of soil samples, and field reports.	

Here is a checklist for ensuring that a report fulfills its goals.

1. Report considers the audience's needs
2. Format follows function of report
3. Format reflects institutional norms and expectations
4. Information is accurate, complete, and documented
5. Information is easy to read
6. Terms are clearly defined
7. Figures, tables, and art support written content
8. Figures, tables, and art are clear and correctly labeled
9. Figures, tables, and art are easily understood without text support
10. Words are easy to read (font, arrangement, organization)
11. Results are clear and concise
12. Recommendations are reasonable and well-supported
13. Report represents your best effort
14. Report speaks for itself without your clarification or explanation

Key Takeaway

Informational and analytical reports require organization and a clear purpose.

Exercises

1. Find an annual report for a business you would like to learn more about. Review it with the previous reading in mind and provide examples. Share and compare with classmates.
2. Write a report on a trend in business that you've observed, and highlight at least the main finding. For example, from the rising cost of textbooks to the online approach to course content, textbooks are a significant issue for students. Draw from your experience as you bring together sources of information to illustrate a trend. Share and compare with classmates.

References

Bovee, C., & Thill, J. (2010). *Business communication essentials: A skills-based approach to vital business English* (4th ed.). Upper Saddle River, NJ: Prentice Hall.

3.1.5: Résumé

Learning Objectives

1. Describe the differences among functional, reverse chronological, combination, targeted, and scannable résumés.
2. Discuss what features are required in each type of résumé.
3. Prepare a one-page résumé.

A résumé is a document that summarizes your education, skills, talents, employment history, and experiences in a clear and concise format for potential employers. The résumé serves three distinct purposes that define its format, design, and presentation:

1. To represent your professional information in writing
2. To demonstrate the relationship between your professional information and the problem or challenge the potential employer hopes to solve or address, often represented in the form of a job description or duties
3. To get you an interview by clearly demonstrating you meet the minimum qualifications and have the professional background help the organization meet its goals

An online profile page is similar to a résumé in that it represents you, your background and qualifications, and adds participation to the publication. People network, link, and connect in new ways via online profiles or professional sites like LinkedIn. In many ways, your online profile is an online version of your résumé with connections and friends on public display. Your MySpace and Facebook pages are also often accessible to the public, so never post anything you wouldn't want your employer (current or future) to read, see, or hear. This chapter covers a traditional résumé, as well as the more popular scannable features, but the elements and tips could equally apply to your online profile.

Main Parts of a Résumé

Regardless of the format, employers have expectations for your résumé. They expect it to be clear, accurate, and up to date (Bennett, S. A., 2005). This document represents you in your absence, and you want it to do the best job possible. You don't want to be represented by spelling or grammatical errors, as they may raise questions about your education and attention to detail. Someone reading your résumé with errors will only wonder what kind of work you might produce that will poorly reflect on their company. There is going to be enough competition that you don't want to provide an easy excuse to toss your résumé at the start of the process. Do your best work the first time.

Résumés have several basic elements that employers look for, including your contact information, objective or goal, education and work experience, and so on. Each résumé format may organize the information in distinct ways based on the overall design strategy, but all information should be clear, concise, and accurate (Simons, W., and Curtis, R., 2004).

Contact Information

This section is often located at the top of the document. The first element of the contact information is your name. You should use your full, legal name even if you go by your middle name or use a nickname. There will plenty of time later to clarify what you prefer to be called, but all your application documents, including those that relate to payroll, your social security number, drug screenings, background checks, fingerprint records, transcripts, certificates or degrees, should feature your legal name. Other necessary information includes your address, phone number(s), and e-mail address. If you maintain two addresses (e.g., a campus and a residential address), make it clear where you can be contacted by indicating the primary address. For business purposes, do not use an unprofessional e-mail address like sexiluvr93@hotmale.com or tutifruti@yafoo.com. Create a new e-mail account if needed with an address suitable for professional use.

Ima Jobseeker

Primary Address: Campus
Northern Arizona University–Yuma
Keno Dorm, 2020 S. Avenue 8E, Yuma, AZ 85365
(928) 344-7649
E-mail: blackbord.blackhole@azwestern.edu

Home Address:
1234 Main Street
Phoenix, AZ 85001
(555) 123-4568
Ima.jobseeker@gmail.com

Figure 3.1.5.1: Sample Contact Information

Objective

This is one part of your résumé that is relatively simple to customize for an individual application. Your objective should reflect the audience's need to quickly understand how you will help the organization achieve its goals.

Objective: To contribute to an increase in sales at ABC Corporation as a sales representative.

Figure 3.1.5.2: Sample Objective

Education

You need to list your education in reverse chronological order, with your most recent degree first. List the school, degree, and grade point average (GPA). If there is a difference between the GPA in your major courses and your overall GPA, you may want to list them separately to demonstrate your success in your chosen field. You may also want to highlight relevant coursework that directly relate to the position.

EDUCATION

Northern Arizona University-Yuma, Arizona, May 2009
Bachelor in Business Administration, Minor in Communication
Major GPA: 3.9/4.0
Overall GPA: 3.4/4.0

Related Course Work:

Business and Professional Speaking, Business English, Sales and Persuasion, Management

Figure 3.1.5.3: Sample Education Field

Work Experience

List in reverse chronological order your employment history, including the positions, companies, locations, dates, duties and skills demonstrated or acquired. You may choose to use active, descriptive sentences or bullet lists, but be consistent. Emphasize responsibilities that involved budgets, teamwork, supervision, and customer service when applying for positions in business and industry, but don't let emphasis become exaggeration. This document represents you in your absence, and if information is false, at a minimum you could lose your job.

WORK EXPERIENCE

Dolle Company, Yuma, AZ, August 2005–May 2009
Shift Manager, Lettuce Processing and Packaging

- Supervise 30 team members
- Develop, coordinate, implement, and evaluate shift schedule
- Address quality-control improvements, including employee training

Saveway Grocery, Yuma, AZ, August 2004–August 2005
Assistant Produce Manager, Vegetables

- Stock, order, and manage display of vegetables in produce department
- Supervise part-time staff as needed
- Manage produce budget, including purchase orders

Figure 3.1.5.4: Sample Work Experience

Table 3.1.5.1: Types of Résumés

Type	Function	Advantage	Disadvantage
1. Reverse Chronological	Reverse chronological résumés (also called reverse time order) focus on work history.	Demonstrates a consistent work history	It may be difficult to highlight skills and experience.
2. Functional	Functional résumés (also called competency-based résumés) focus on skills.	Demonstrates skills that can clearly link to job functions or duties	It is often associated with people who have gaps in their employment history.
3. Combination	A combination résumé lists your skills and experience first, then employment history and education.	Highlights the skills you have that are relevant to the job and provides a reverse chronological work history	Some employers prefer a reverse chronological order.
4. Targeted	A targeted résumé is a custom document that specifically highlights the experience and skills that are relevant to the job.	Points out to the reader how your qualifications and experience clearly match the job duties	Custom documents take additional time, preparation, analysis of the job announcement, and may not fit the established guidelines.
5. Scannable	A scannable résumé is specifically formatted to be read by a scanner and converted to digital information.	Increasingly used to facilitate search and retrieval, and to reduce physical storage costs	Scanners may not read the résumé correctly.

You may choose to include references at the end of your résumé, though "references upon request" is common. You may also be tempted to extend your résumé to more than one page, but don't exceed that limit unless the additional page will feature specific, relevant information that represents several years of work that directly relates to the position. The person reading your résumé may be sifting through many applicants and will not spend time reading extra pages. Use the one-page format to put your best foot forward, remembering that you may never get a second chance to make a good first impression.

Maximize Scannable Résumé Content

Use Key Words

Just as there are common search terms, and common words in relation to each position, job description, or description of duties, your scannable résumé needs to mirror these common terms. Use of nonstandard terms may not stand out, and your indication of "managed employees" may not get the same attention as the word "supervision" or "management."

Follow Directions

If a job description uses specific terms, refers to computer programs, skills, or previous experience, make sure you incorporate that language in your scannable résumé. You know that when given a class assignment, you are expected to follow directions; similarly, the employer is looking for specific skills and experience. By mirroring the employer's language and submitting your application documents in accord with their instructions, you convey a spirit of cooperation and an understanding of how to follow instructions.

Insert a Key Word Section

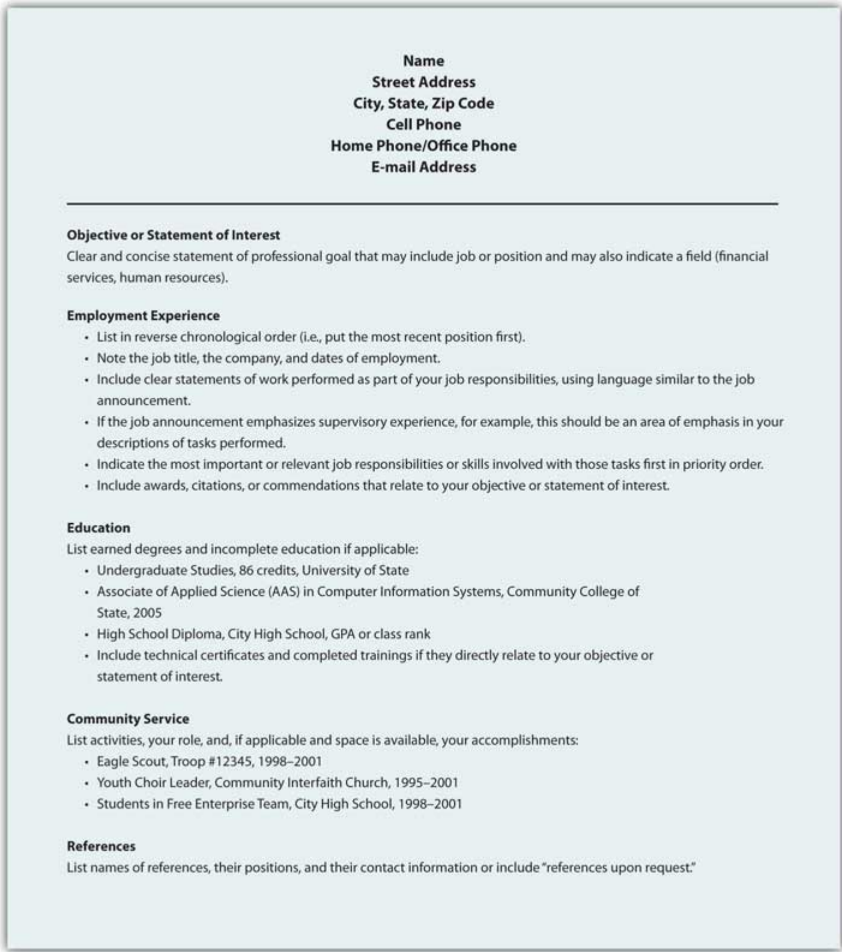
Consider a brief section that lists common words associated with the position as a skills summary: customer service, business communication, sales, or terms and acronyms common to the business or industry.

Make It Easy to Read

You need to make sure your résumé is easy to read by a computer, including a character recognition program. That means no italics, underlining, shading, boxes, or lines. Choose a sans serif (without serif, or decorative end) font like Arial or Tahoma that won't be misread. Simple, clear fonts that demonstrate no points at which letters may appear to overlap will increase the probability of the computer getting it right the first time. In order for the computer to do this, you have to consider your audience—a computer program that will not be able to interpret your unusual font or odd word choice. A font size of eleven or twelve is easier to read for most people, and while the computer doesn't care about font size, the smaller your font, the more likely the computer is to make the error of combining adjacent letters.

Printing, Packaging and Delivery

Use a laser printer to get crisp letter formation. Inkjet printers can have some "bleed" between characters that may make them overlap, and therefore be misunderstood. Folds can make it hard to scan your document. E-mail your résumé as an attachment if possible, but if a paper version is required, don't fold it. Use a clean, white piece of paper with black ink; colors will only confuse the computer. Deliver the document in a nine-by-twelve-inch envelope, stiffened with a sheet of cardstock (heavy paper or cardboard) to help prevent damage to the document.



Name
Street Address
City, State, Zip Code
Cell Phone
Home Phone/Office Phone
E-mail Address

Objective or Statement of Interest
Clear and concise statement of professional goal that may include job or position and may also indicate a field (financial services, human resources).

Employment Experience
- List in reverse chronological order (i.e., put the most recent position first).
- Note the job title, the company, and dates of employment.
- Include clear statements of work performed as part of your job responsibilities, using language similar to the job announcement.
- If the job announcement emphasizes supervisory experience, for example, this should be an area of emphasis in your descriptions of tasks performed.
- Indicate the most important or relevant job responsibilities or skills involved with those tasks first in priority order.
- Include awards, citations, or commendations that relate to your objective or statement of interest.

Education
List earned degrees and incomplete education if applicable:
- Undergraduate Studies, 86 credits, University of State
- Associate of Applied Science (AAS) in Computer Information Systems, Community College of State, 2005
- High School Diploma, City High School, GPA or class rank
- Include technical certificates and completed trainings if they directly relate to your objective or statement of interest.

Community Service
List activities, your role, and, if applicable and space is available, your accomplishments:
- Eagle Scout, Troop #12345, 1998–2001
- Youth Choir Leader, Community Interfaith Church, 1995–2001
- Students in Free Enterprise Team, City High School, 1998–2001

References
List names of references, their positions, and their contact information or include "references upon request."

Figure 3.1.5.5: Sample Format for Chronological Résumé

Name
Street Address
City, State, Zip Code
Cell Phone
Home Phone/Office Phone
E-mail Address

Objective
Clear and concise statement of professional goal (job or position)

Qualification Highlights
Experience that directly relates to job description

- You may choose to highlight a specific skill that relates to the position (e.g., bilingual, computer and technology proficient, certified diesel technician).
- Only highlight specific skills, certifications, or license(s) that indicate you meet (or exceed) the minimum qualifications.
- Only highlight personal traits if they clearly meet the position description (e.g., if a sales position requires an outgoing personality, highlight theater experience and previous sales experience).

Professional Skills

- You may want to list skills with clear "because" statements, demonstrating your mastery of a skill because of your volunteer work, internship, previous employment, or similar accomplishment.

<u>Sales</u>
You may also want to use a key skill as the focal point (e.g., sales) and include a series of brief statements that demonstrate range or depth of experience in that skill:

- Fundraising for your youth group (name of organization, date)
- Customer service call experience
- Voter recruitment initiative participation
- Census bureau work

<u>Skill 2</u>

Employment History
You may not need this category if you covered it in the skill summaries above.

Education
List earned degrees and incomplete education if applicable:

- Undergraduate Studies, 86 credits, University of State

References
List names of references, their positions, and their contact information or include "references upon request."

Figure 3.1.5.6: Sample Format for Functional Résumé

Name
Street Address
City, State, Zip Code
Cell Phone
Home Phone/Office Phone
E-mail Address

Objective
Clear and concise statement of professional goal (job or position)

Education
List earned degrees and incomplete education if applicable:

Bachelor of Science (BS) in Computer Information Systems
City State University, Hometown, State, June 2007

Associates of Applied Science (AAS) in Computer Information Systems
Community College of State, Hometown

Employment
Customer Service Representative, Quickcare Computer Repair
Hometown, State, August 2007–December 2007

List skills and certifications clearly:

Diagnostic Assessment
Computer Repair
Onsite Customer Service
Materials Handling
Computer Skills
Adobe Certified Associate ACA
Alcatel-Lucent Network Routing Specialist I NRS I
Certified Technical Trainer CTT+
Digital Home Technology Integrator DHTI+
Linux+
Network+
PDI+
Project+
Security+
Server+
Microsoft: MCTS, MCA

References
List names of references, their positions, and their contact information or include "references upon request."

Figure 3.1.5.7: Sample Format for Scannable Résumé

Key Takeaway

A résumé will represent your skills, education, and experience in your absence. Businesses increasingly scan résumés into searchable databases.

Exercises

1. Find a job announcement with specific duties that represents a job that you will be prepared for upon graduation. Choose a type of résumé and prepare your résumé to submit to the employer as a class assignment. Your instructor may also request a scannable version of your résumé.
2. Conduct an online search for a functional or chronological résumé. Please post and share with your classmates.
3. Conduct an online search for job advertisements that detail positions you would be interested in, and note the key job duties and position requirements. Please post one example and share with your classmates.
4. When is a second page of your résumé justified? Explain.
5. Conduct an online search for resources to help you prepare your own résumé. Please post one link and a brief review of the Web site, noting what features you found useful and at least one recommendation for improvement.

References

- Bennett, S. A. (2005). *The elements of résumé style: Essential rules and eye-opening advice for writing résumés and cover letters that work*. AMACOM.

- Simons, W., & Curtis, R. (2004). *The Résumé.com guide to writing unbeatable résumés*. New York, NY: McGraw-Hill.

3.1.6: Sales Message

Learning Objectives

1. Discuss a basic sales message and identify its central purpose
2. Detail the main parts of a sales message and understand strategies for success

A sales message is the central persuasive message that intrigues, informs, persuades, calls to action, and closes the sale. Not every sales message will make a direct sale, but the goal remains. Whether your sales message is embedded in a letter, represented in a proposal, or broadcast across radio or television, the purpose stays the same.

Sales messages are often discussed in terms of reason versus emotion. Every message has elements of ethos, or credibility; pathos, or passion and enthusiasm; and logos, or logic and reason. If your sales message focuses exclusively on reason with cold, hard facts and nothing but the facts, you may appeal to some audience, but certainly not the majority. Buyers make purchase decisions on emotion as well as reason, and even if they have researched all the relevant facts about competing products, the decision may still come down to impulse, emotion, and desire. If your sales message focuses exclusively on emotion, with little or no substance, it may not be taken seriously. Finally, if your sales message does not appear to have credibility, the message will be dismissed. In the case of the sales message, you need to meet the audience's needs that vary greatly.

In general, appeals to emotion pique curiosity and get our attention, but some attention to reason and facts should also be included. That doesn't mean we need to spell out the technical manual on the product on the opening sale message, but basic information about design or features, in specific, concrete ways can help an audience make sense of your message and the product or service. Avoid using too many abstract terms or references, as not everyone will understand these. You want your sales message to do the work, not the audience.

Format for a Common Sales Message

A sales message has the five main parts of any persuasive message.

Table 3.1.6.1: Five Main Parts of a Persuasive Message

Attention Statement	Use humor, novelty, surprise, or the unusual to get attention.
Introduction	Build interest by appealing to common needs and wants, and include a purpose statement to set up expectations.
Body	Establish credibility, discuss attractive features, and compare with competitors, addressing concerns or potential questions before they are even considered.
Conclusion	Sum it up and offer solution steps or calls to action, motivating the audience to take the next step. The smaller the step, the more likely the audience will comply. Set up your audience for an effective closing.
Residual Message	Make the sale, make them remember you, and make sure your final words relate to the most important information, like a contact phone number.

Getting Attention

Your sales message will compete with hundreds of other messages and you want it to stand out (Price, D., 2005). One effective way to do that is to make sure your attention statement(s) and introduction clearly state how the reader or listener will benefit.

- Will the product or service save time or money?
- Will it make them look good?
- Will it entertain them?
- Will it satisfy them?

Regardless of the product or service, the audience is going to consider first what is in it for them. A benefit is what the buyer gains with the purchase and is central to your sales message. They may gain social status, popularity, sex appeal, or even reduce or eliminate something they don't want. Your sales message should clearly communicate the benefits of your product or service (Winston, W., and Granat, J., 1997).

Sales Message Strategies for Success

Your product or service may sell itself, but if you require a sales message, you may want to consider these strategies for success:

1. **Start with your greatest benefit**. Use it in the headline, subject line, caption, or attention statement. Audiences tend to remember the information from the beginning and end of a message, but have less recall about the middle points. Make your first step count by highlighting the best feature first.
2. **Take baby steps**. One thing at a time. Promote, inform, and persuade on one product or service at a time. You want to hear "yes" and make the associated sale, and if you confuse the audience with too much information, too many options, steps to consider, or related products or service, you are more likely to hear "no" as a defensive response as the buyer tries not to make a mistake. Avoid confusion and keep it simple.
3. **Know your audience**. The more background research you can do on your buyer, the better you can anticipate their specific wants and needs and individualize your sales message to meet them.
4. **Lead with emotion, follow with reason**. Gain the audience's attention with drama, humor, or novelty and follow with specific facts that establish your credibility, provide more information about the product or service, and lead to your call to action to make the sale.

These four steps can help improve your sales message, and your sales. Invest your time in planning and preparation, and consider the audience's needs as you prepare your sales message.

To: (Potential Customer)

From: Your friendly auto service provider

Subject: Time for an oil change? Save $10

Dear (potential customer's name spelled correctly):

We noticed it has been over three months since your last oil change with us. This is a friendly reminder that when you take care of your car, it takes care of you. We'd like to offer you $10 off your next oil and filter change this month. Please e-mail, call, or stop by, and we'll help you keep your car in excellent health.

Sincerely,

Molly Mechanic, General Manager

Auto Doctors, 555 S. Main Street, City, ST 12345

555-123-4567

Figure 3.1.6.1: Sample E-mail Sales Message

Key Takeaway

A sales message combines emotion and reason, and reinforces credibility, to create interest in a product or service that leads to a sale.

Exercises

1. Create your own e-mail sales message in a hundred words or less. Share it with the class.
2. Identify one sales message you consider to be effective. Share it with classmates and discuss why you perceive it to be effective.
3. Please consider one purchase you made recently. What motivated you to buy and why did you choose to complete the purchase? Share the results with your classmates.
4. Are you more motivated by emotion or reason? Ask ten friends that question and post your results.

References

- Price, D. (2005, October 30). *How to communicate your sales message so buyers take action now!* Retrieved June 14, 2009, from ezinearticles.com: http://ezinearticles.com/?How-To-Communicate-Your-Sales-Message-So-Buyers-Take-Action-Now!&id=89569.
- Winston, W., & Granat, J. (1997). *Persuasive advertising for entrepreneurs and small business owners: How to create more effective sales messages*. New York, NY: Routledge.

3.1.7: Additional Resources

Visit NetLingo for some common texting abbreviations. http://www.netlingo.com/acronyms.php

The Online Writing Lab (OWL) at Purdue University includes an area on e-mail etiquette. http://owl.english.purdue.edu/owl/resource/636/01

Shea's Netiquette online is another useful source. http://www.albion.com/netiquette/book/index.html

The *New York Times* blog "Gadgetwise: Getting Smart About Personal Technology" discusses an ever-changing variety of questions related to netiquette. http://gadgetwise.blogs.nytimes.com

The OWL at Purdue also includes pages on memo writing and a sample memo. http://owl.english.purdue.edu/owl/resource/590/01; http://owl.english.purdue.edu/owl/resource/590/04

For 642 sample letters, from cover letters to complaints, go to this site. www.4hb.com/letters

Visit this Negotiations.com page for information on writing a request for proposal, quotation, and information. http://www.negotiations.com/articles/procurement-terms

Visit this site for additional proposal writing tips. www.4hb.com/0350tipwritebizproposal.html

TechSoup offers a sample Request for Proposal. http://www.techsoup.org/support/articles-and-how-tos/rfp-library

Your online profile counts as much as your résumé. http://www.npr.org/templates/story/story.php?storyId=105483848&sc=nl&cc=es-20090628

Read a *Forbes* article on "Ten Ways to Torpedo Your Sales Pitch." http://www.forbes.com/2007/08/01/microsoft-ebay-symantec-ent-sales-cx_mf_0801byb07_torpedo.html

Direct mail and other sales copy written by Susanna Hutcheson. http://www.powerwriting.com/port.html

Visit this site for tips on how to write a public service announcement (PSA). www.essortment.com/tips-write-public-service-announcement-34787.html

The National Institute of Justice provides guidelines on writing a PSA. www.nij.gov/topics/courts/restorative-justice/marketing-media/pages/psa.aspx

The AdCouncil provides a range of examples. http://www.adcouncil.org/Our-Campaigns

SECTION OVERVIEW

3.2: Negative Messages and Crisis Communication

Thumbnail: pixabay.com/illustrations/gr...ssion-3078540/

3.2.1: Delivering a Negative News Message

Learning Objectives

- List and discuss seven goals of a negative news message.
- Write an effective negative news message.

The negative news message delivers news that the audience does not want to hear, read, or receive. Delivering negative news is never easy. Whether you are informing someone they are being laid off or providing constructive criticism on their job performance, how you choose to deliver the message can influence its response (Bovee, C. and Thill, J., 2010). Some people prefer their bad news to be direct and concise. Others may prefer a less direct approach. Regardless whether you determine a direct or indirect approach is warranted, your job is to deliver news that you anticipate will be unwelcome, unwanted, and possibly dismissed.

In this section we will examine several scenarios that can be communicated internally (within the organization) and externally (outside the organization), but recognize that the lines can be blurred as communication flows outside and through an organization or business. Internal and external communication environments often have a degree of overlap. The rumor of anticipated layoffs may surface in the local media, and you may be called upon to address the concern within the organization. In a similar way, a product that has failed internal quality control tests will require several more tests and improvements before it is ready for market, but if that information leaves the organization, it can hurt the business reputation, prospects for future contracts, and the company's ability to secure financing.

Communication is constantly present, and our ability to manage, clarify, and guide understanding is key to addressing challenges while maintaining trust and integrity with employees, stakeholders, and the public.

There are seven goals to keep in mind when delivering negative news, in person or in written form:

1. Be clear and concise in order not to require additional clarification.
2. Help the receiver understand and accept the news.
3. Maintain trust and respect for the business or organization and for the receiver.
4. Avoid legal liability or erroneous admission of guilt or culpability.
5. Maintain the relationship, even if a formal association is being terminated.
6. Reduce the anxiety associated with the negative news to increase comprehension.
7. Achieve the designated business outcome.

Let's examine our first scenario:

You are a supervisor and have been given the task of discussing repeated tardiness with an employee, Chris. Chris has frequently been late for work, and the problem has grown worse over the last two weeks. The tardiness is impairing not only Chris's performance, but also that of the entire work team. Your manager has instructed you to put an end to it. The desired result is for Chris to stop his tardiness behavior and improve his performance.

You can

1. stop by Chris's cubicle and simply say, "Get to work on time or you are out";
2. invite Chris out to a nice lunch and let him have it;
3. write Chris a stern e-mail;
4. ask Chris to come to your office and discuss the behavior with him in private.

While there are many other ways you could choose to address the situation, let's examine each of these four alternatives in light of the goals to keep in mind when presenting negative news.

First, you could approach Chris in his work space and speak to him directly. Advantages include the ability to get right to the point right away. Disadvantages include the strain on the supervisor-employee relationship as a result of the public display of criticism, the possibility that Chris may not understand you, the lack of a formal discussion you can document, and the risk that your actions may not bring about the desired results.

The goals include the desire to be clear and concise in order not to require additional clarification. This possible response does not provide the opportunity for discussion, feedback, or confirmation that Chris has clearly understood your concern. It fails to address the performance concern, and limits the correction to the tardiness. It fails to demonstrate respect for all parties. The lack of tact apparent in the approach may reflect negatively on you as the supervisor, not only with Chris but with your manager as well.

When you need to speak to an employee about a personnel concern, it is always best to do it in private. Give thought and concern to the conversation before it occurs, and make a list of points to cover with specific information, including grievances. Like any other speech, you may need to rehearse, particularly if this type of meeting is new to you. When it comes time to have the discussion, issue the warning, back it up in writing with documentation, and don't give the impression that you might change your decision. Whether the issue at hand is a simple caution about tardiness or a more serious conversation, you need to be fair and respectful, even if the other person has been less than professional. Let's examine the next alternative.

Let's say you invite Chris to lunch at a nice restaurant. There is linen on the table, silverware is present for more than the main course, and the water glasses have stems. The environment says "good job" in its uniqueness, presentation, and luxury. Your word will contradict this nonverbal message. The juxtaposition between the environment and the verbal message will cause tension and confusion, which will probably be an obstacle to the receiver's ability to listen. If Chris doesn't understand the message, and the message requires clarification, your approach has failed. The contrast between the restaurant setting and the negative message does not promote understanding and acceptance of the bad news or correction. Furthermore, it does not build trust in the relationship, as the restaurant invitation might be interpreted as a "trap" or a betrayal. Let's examine yet another approach.

You've written Chris a stern e-mail. You've included a list of all the recent dates when he was late and made several statements about the quality of his work. You've indicated he needs to improve, and stop being late, or else. But was your e-mail harassment? Could it be considered beyond the scope of supervision and interpreted as mean or cruel? And do you even know if Chris has received it? If there was no reply, do you know whether it achieved its desired business outcome? A written message may certainly be part of the desired approach, but how it is presented and delivered is as important as what it says. Let's examine our fourth approach to this scenario.

You ask Chris to join you in a private conversation. You start the conversation with an expression of concern and an open-ended question: "Chris, I've been concerned about your work lately. Is everything all right?" As Chris answers, you may demonstrate that you are listening by nodding your head, and possibly taking notes. You may learn that Chris has been having problems sleeping, or that his living situation has changed. Or Chris may decline to share any issues, deny that anything is wrong, and ask why you are concerned. You may then state that you've observed the chronic tardiness, and name one or more specific mistakes you have found in Chris's work, ending with a reiteration that you are concerned. This statement of concern may elicit more responses and open the conversation up into a dialogue where you come to understand the situation, Chris sees your concern, and the relationship is preserved. Alternatively, in case the conversation does not go well, you will still keep a positive attitude even as you document the meeting and give Chris a verbal warning.

Regardless of how well or poorly the conversation goes, if Chris tells other employees about it, they will take note of how you handled the situation, and it will contribute to their perception of you. It guides their expectations of how you operate and how to communicate with you, as this interaction is not only about you and Chris. You represent the company and its reputation, and your professional display of concern as you try to learn more sends a positive message. While the private, respectful meeting may not be the perfect solution, it is preferable to the other approaches we have considered.

Figure 3.2.1.1: Performance evaluations usually involve constructive criticism. Matt Hintsa – Constructive Criticism – CC BY-NC-ND 2.0.

One additional point to consider as you document this interaction is the need to present the warning in writing. You may elect to prepare a memo that outlines the information concerning Chris’s performance and tardiness and have it ready should you want to present it. If the session goes well, and you have the discretion to make a judgment call, you may elect to give him another week to resolve the issue. Even if it goes well, you may want to present the memo, as it documents the interaction and serves as evidence of due process should Chris’s behavior fail to change, eventually resulting in the need for termination.

This combined approach of a verbal and written message is increasingly the norm in business communication. In the next two sections, we’ll compare and contrast approaches, verbal and written, and outline several best practices in terms of approach. But first, we’ll outline the four main parts of a negative news message:

1. Buffer or cushion
2. Explanation
3. Negative news
4. Redirect

The first part of a negative news message, verbal or written, involves neutral or positive information. This sets the tone and often serves as a buffer or cushion for the information to come. Next, an explanation discusses why there is an issue in the first place. This may be relatively simple, quite complex, or uncomfortable. In a journal article titled “Further Conceptualization of Explanations in Negative News Messages,” (Limaye, Mohan R., 1997) Mohan Limaye makes the clear case that not only is an explanation a necessary part of any negative news message, it is an ethical and moral requirement. While an explanation is important, never admit or imply responsibility without written authorization from your company cleared by legal counsel. The third part of the negative news message involves the bad news itself, and the emphasis here is on clarity and accuracy. Finally, the redirect may refocus attention on a solution strategy, an alternative, or the subsequent actions that will take place. Table 3.2.1.1 provides an example that might apply in an external communication situation.

Table 3.2.1.1: Negative News Message Sample Script

Parts of the Negative News Message	Example
Buffer or Cushion	Thank you for your order. We appreciate your interest in our product.
Explanation	We are writing to let you know that this product has been unexpectedly popular, with over 10,000 requests on the day you placed your order.
Negative News	This unexpected increase in demand has resulted in a temporary out-of-stock/backorder situation. We will fulfill your order, received at 11:59 p.m. on 09/09/2009, in the order it was received.
Redirect	We anticipate that your product will ship next Monday. While you wait, we encourage you to consider using the enclosed $5 off coupon toward the purchase of any product in our catalog. We appreciate your business and want you to know that our highest priority is your satisfaction.

In Table 3.2.1.1, the neutral or positive news comes first and introduces the customer to the overall topic. The explanation provides an indication of the purpose of the communication, while the negative message directly addresses how it affects the customer. The redirect discusses specific actions to take place. In this case, it also includes a solution strategy enhanced with a soft sell message, a subtle, low-pressure method of selling, cross-selling, or advertising a product or service. Whether you are delivering negative news in person or in writing, the four main parts of a negative message can help you meet all seven goals.

Before we move to the verbal and written delivery of the negative news message, we need to offer a word of counsel. You want to avoid legal problems when communicating bad news. You cannot always predict how others are going to respond, but you can prepare for and deliver your response in ways that lower the risk of litigation in four ways:

1. Avoid abusive language or behavior.
2. Avoid contradictions and absolutes.
3. Avoid confusion or misinterpretation.
4. Maintain respect and privacy.

Sarcasm, profanity, shouting, or abusive or derogatory language is an obstacle to clear communication. Furthermore, such language can be interpreted as defamatory, or harming the reputation of the person, possibly having a negative impact on their future earnings. In written form, it is called libel. If you say it out loud, it is called slander. While slander may be harder to prove, no defamatory remarks should be part of your negative news message. Cell phones increasingly serve to record conversations, and you simply never know if your words will come back to you in short order. Represent yourself, the business, and the receiver of your message with professionalism and avoid abusive or defamatory language.

You also want to avoid contradictions, as they only serve to invite debate. Make sure your information is consistent and in agreement with the general information in the conversation. If one part of the information stands out as a contradiction, its importance will be magnified in the context and distract from your main message. Don't provide more information that is necessary. Polarizing, absolute terms like "always" and "never" are often part of sweeping generalizations that are open to debate. Instead of saying, "You are always late," choose to say, "You were late sixteen times in May." To avoid confusion or misinterpretation, be precise and specific.

Always maintain respect and privacy. Making a negative statement about an employee in front of a group of coworkers can be considered ridicule or harm, and in the coming cases may be actionable and involve legal ramifications. In addition to the legal responsibility, you have the overall goal of demonstrating professionalism as you represent yourself and your company in maintaining the relationship with the employee, even if the end goal is termination. Employees have retaliated against their organizations in many ways, from discouraging remarks to vandalism and computer viruses. Your goal is to avoid such behavior, not out of fear, but out of professionalism and respect for yourself and your organization. Open lines of communication present in a relationship can help reduce the risk of relational deterioration or animosity. The sidebar below provides a checklist for delivering a negative message.

Negative Message Checklist

1. Clear goal in mind
2. Clear instructions from supervisor (legal counsel)
3. Clear understanding of message
4. Clear understanding of audience/reader

5. Clear understanding of procedure and protocol
6. Clear, neutral opening
7. Clear explanation without admission of guilt or culpability
8. Clear statement of impact or negative news
9. Clear redirect with no reminders of negative news
10. Clear results with acceptance or action on negative news

Presenting Negative News in Person

Most of us dislike conflict. It may be tempting to avoid face-to-face interaction for fear of confrontation, but delivering negative news in person can be quite effective, even necessary, in many business situations. When considering a one-on-one meeting or a large, formal meeting, consider the preparation and implementation of the discussion.

The first step involves a clear goal. Stephen Covey (1989) recommends beginning with the end in mind (Covey, S., 1989). Do you want your negative news to inform, or to bring about change, and if so what kind of change and to what degree? A clear conceptualization of the goal allows you to anticipate the possible responses, to plan ahead, and to get your emotional "house" in order.

Your emotional response to the news and the audience, whether it is one person or the whole company, will set the tone for the entire interaction. You may feel frustrated, angry, or hurt, but the display of these emotions is often more likely to make the problem worse than to help solve it. Emotions can be contagious, and people will respond to the emotional tone of the speaker.

If your response involves only one other person, a private, personal meeting is the best option, but it may not be available. Increasingly people work and contribute to projects from a distance, via the Internet, and may only know each other via e-mail, phone, or videophone/videoconferencing services. A personal meeting may be impractical or impossible. How then does one deliver negative news in person? By the best option available to both parties. Written feedback may be an option via e-mail, but it takes time to prepare, send, receive, process, and respond—and the written word has its disadvantages. Miscommunication and misinterpretation can easily occur, with little opportunity for constructive feedback to check meanings and clarify perceptions.

The telephone call allows both parties to hear each other's voices, including the words, the inflection, the disfluencies, and the emotional elements of conversation. It is immediate in that the possibility of overlap is present, meaning not only is proximity in terms of voice as close as possible, but both parties may experience overlaps as they take turns and communicate. Telephone calls allow for quick feedback and clarification questions, and allow both parties an opportunity to recycle and revisit topics for elaboration or a better understanding. They also can cover long distances with reasonable clarity. Voice over Internet protocol (VoIP) allows you to do the same with relatively little cost.

While there are distinct advantages, the telephone lacks part of the nonverbal spectrum available to speakers in a live setting. On the telephone, proximity is a function of response time rather than physical space and the degree to which one person is near another. Time is also synchronous, though the telephone crosses time zones and changes the context as one party may have just arrived at work while the other party is leaving for lunch. Body language gets lost in the exchange as well, although many of us continue to make hand gestures on the phone, even when our conversational partners cannot see us. Paralanguage, or the sounds we hear that are not verbal, including pitch, tone, rate, rhythm, pace, articulation, and pronunciation are all available to the listener. As we can see, the telephone call allows for a richer communication experience than written communication, but cannot convey as much information as would be available in person. Just as a telephone interview may be used for screening purposes while a live interview is reserved for the final candidates, the live setting is often considered the best option for delivering negative news.

Live and in person may be the best option for direct communication with immediate feedback. In a live setting time is constant. The participants may schedule a breakfast meeting, for example, mirroring schedules and rhythms. Live, face-to-face communication comes in many forms. The casual exchange in the hallway, the conversation over coffee, and the formal performance review meeting all have interpersonal communication in common.

If you need to share the message with a larger audience, you may need to speak to a group, or you might even have to make a public presentation or speech. If it needs a feedback loop, we often call it a press conference, as the speech is followed by a question and answer session. From meeting in the hallway to live, onstage, under camera lights and ready for questions, the personal delivery of negative news can be a challenging task.

Presenting Negative News in Writing

Writing can be intrapersonal, between two people, group communication, public communication, or even mass communication. One distinct advantage of presenting negative news in writing is the planning and preparation that goes into the message, making the initial communication more predictable. When a message is delivered orally in an interpersonal setting, we may interrupt each other, we sometimes hear what we want to, and it often takes negotiation and listening skills to grasp meaning. While a written message, like all messages, is open to interpretation, the range of possibilities is narrowed and presented within the frame and format designed by the source or author.

The written message involves verbal factors like language and word choice, but it can also involve nonverbal factors like timing and presentation. Do you communicate the message on letterhead, do you choose the channel of e-mail over a hard copy letter, or do you compose your written message in your best penmanship? Each choice communicates meaning, and the choice of how you present your written message influences its reception, interpretation, and the degree to which it is understood. In this section we consider the written message that delivers negative news.

Let’s consider several scenarios:

1. A community disaster such as illness (e.g., a swine flu epidemic), earthquake, wildfire, plane crash, or a terrorism incident
2. An on-the-job accident with injuries or even death
3. A product defect resulting in injuries, illness, or even death to consumers
4. An unsuccessful product test (e.g., a new software system that isn’t going to be ready for launch as planned)
5. A company merger that may result in reductions in force or layoffs

In business communication we often categorize our communication as internal or external. Internal communication is the sharing and understanding of meaning between individuals, departments, or representatives of the same business. External communication is the sharing and understanding of meaning between individuals, departments, or representatives of the business and parties outside the organization. Across the five scenarios we’ll consider each of these categories in turn.

The confirmation of swine flu (H1N1) may first occur with a laboratory report (itself a written document), but it is normally preceded by conversations between health care professionals concerned over the symptoms exhibited by patients, including a high fever, a cough, sore throat, and a headache. According to Sally Redman, a registered nurse at Student Health Services at Washington State University–Pullman, over two thousand students (of nineteen thousand total student population) presented symptoms on or around August 21, 2009 (Yardley, W., 2009).

Communication will predictably occur among students, health care professionals, and the community, but parents at a distance will want to know not only the status of their child, but also of the university. A written message that necessarily contains negative news may be written in the form of a press release, for example, noting important information like the number of students affected, the capacity of the health care system to respond, the experience to date, and whom to contact for further details and updates. This message will be read over and over as parents, reporters, and people across the country want to learn more about the situation. Like all business communication, it needs to be clear and concise.

Our next scenario offers a learning opportunity as well. An on-the-job accident affects employees and the company, and like our previous example, there will be considerable interest. There may be interpersonal communication between company representatives and the individual’s family, but the company will want to communicate a clear record of the occurrence with an assurance, or statement that the contributing factors that gave rise to the situation has been corrected or were beyond the control of the company and its representatives.

In addition to a statement of record, and an assurance, the company will certainly want to avoid the implication or indication of guilt or culpability. In the case of a product defect resulting in injuries, illness, or even death to consumers, this will be a relevant point of consideration. Perhaps a voluntary recall will be ordered, proactively addressing the risk before an accident occurs. It may also be the case that the recall order is issued by a government agency. Again, a written statement delivering negative news, in this case the recall of a product that presents a risk, must be written with care and consultation of legal counsel.

If your company is publicly traded, the premature announcement of a software program full of bugs, or programming errors that result in less than perfect performance, can send the company’s stock price plummeting. How you release this information within the organization will influence how it is received. If your written internal memo briefly states that the software program development process has been extended to incorporate additional improvements, the emphasis shifts from the negative to the positive. While the negative news, the delay of release, remains, the focus on the benefits of the additional time can influence employees’ views, and can make a difference in how the message is received outside the organization.

The awareness of a merger, and the possibility of a reduction in force or layoffs, will be discussed along the grapevine at work, and will give rise to tension and anticipation of negative news. You could simply write a short memo “To All Employees,” not include any contact information, and have an assistant walk around and place copies on everyone’s chair or desk during the lunch hour. But let’s look at the message this would send to employees. The written communication includes nonverbal aspects like timing and presentation as well as verbal aspects like language and word choice. The timing itself suggests avoidance of conflict, and a reluctance to address the issue with transparency. The presentation of a memo in hard copy form on your chair from an unidentified company representative will certainly cause confusion, may be mistaken for a prank, and could cause considerable stress. It will contribute to increased tensions rather than solidarity, and if trust is the foundation for all effective communication, it violates this principle.

Negative news may not be easy to deliver, but it is necessary at times and should be done with clarity and brevity. All parties should be clearly identified. The negative news itself should be clear and concise. The presentation should be direct, with authority and credibility. Communication occurs between people, and all humans experience concern, fear, and trepidation of the unknown. The negative news message, while it may be unwelcome, can bring light to an issue.

As we mentioned at the beginning of the chapter, some people prefer their bad news to be direct and concise, while others prefer a less direct approach. Let’s weigh the pros and cons of each approach. Table 3.2.1.2contrasts the elements of the two approaches.

Table 3.2.1.2 Direct and Indirect Delivery

Direct Delivery	Direct Example	Indirect Delivery	Indirect Example
		Positive introduction	Thank you for your request for leave.
Negative news message as introduction	Your request for leave has been denied.	Negative news message	We regret to inform you that your request has been denied.
Conclusion	Please contact your supervisor if you need more information.	Conclusion	Please contact your supervisor if you need more information.

The direct approach places the negative news at the beginning of the message, while the indirect approach packages the negative news between a positive introduction, sometimes called a “buffer” or cushion, and a conclusion. Your negative message may include the rationale or reasons for the decision.

The direct approach is often associated with a message where the audience values brevity and the message needs to be concise. A positive introduction often introduces the topic but not the outcome. An effective negative news statement clearly states the message while limiting the possibility of misinterpretation. An effective closing statement may provide reasons, reference a policy, or indicate a procedure to follow for more information.

Key Takeaway

Delivering negative news involves a buffer or cushion statement, an explanation, the negative news itself, and a redirecting statement. Whether you choose a direct or an indirect approach, the message should be delivered clearly and concisely, with respect for the receiver and the organization.

Exercises

1. When should you use an indirect approach in delivering a negative news message? Explain your answer to the class.
2. Ask five friends which they would prefer: negative news in a direct or indirect format? Why? Discuss your results with a classmate.
3. Sales have decreased for two consecutive quarters at your business. You have been instructed to inform your sales team that their hours, and base pay, will be reduced by 20 percent. While you may have a few members of your sales team that are underperforming, you want to retain the entire team. Write a negative news message in a direct or indirect approach informing your sales team of the news.
4. You have observed and documented an employee being late and taking long breaks for the past two weeks. Write out a brief summary of the conversation you need to have. You may be assigned to another classmate for a role-playing exercise. Share and compare with your classmates.

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3.2.2: Eliciting Negative News

Learning Objectives

1. Understand the importance of feedback, even if it is negative.
2. Describe and demonstrate the effective use of open- and closed-ended questions.

How do you know when you are doing a good job? How do you know when, where, and how you could do a better job? What makes the difference between business or organization that is stagnant and one that is dynamic? Often the response to all these questions involves one key, but often overlooked, company resource: feedback. Feedback is the verbal and/or nonverbal response to a message, and that message may involve a company product or service.

Employee surveys, for example, may be completed online, in written form, in small focus groups, and can involve both oral and written communication. In the same way, customer satisfaction surveys may involve similar options and both provide a valuable opportunity to take a critical look at what we are doing, how it is perceived, and what areas we can identify for improvement. They often measure opinions, satisfaction, attitude, brand affiliation, preference, and engagement of customers and employees. In this section we will consider negative news as a valuable tool in self, team, company, product, and service improvement.

Across the years there have been extensive studies on how to improve businesses and companies, from Total Quality Improvement to the Six Sigma approach to excellence. Regardless of the theory, approach, or label, they all rest on a foundation of effective communication. One way that communication is often described involves customer relationship management (Bauer, J. E., Duffy, G. L., and Westcott, R. T., 2006), or the relationship between the organization (sometimes represented by the product or service itself) and the customer.

This leads us to our first point: who is the customer? You might be tempted to say the end-user, the purchaser, or the decision-maker, but customers are often categorized as internal and external. Employees themselves represent internal customers, and their relationship with the business, product, or service has value to the organization. External customers may include the end-user, but can also include vendors and related businesses that are part of the supply chain. This expanded, global view of communication and customer service relationships will guide our discussion as we explore ways to effectively elicit negative news, critical feedback, and praise for a job well done.

Positive news is part of feedback, and indeed the difference between positive and negative news often lies more in the interpretation of information than the information itself. For example, if a software product that your company has been testing for some time, scheduled for a release date in the near future, has failed several tests, the tendency to view the news as negative is understood. The fact that the problems and issues were identified prior to release, however, provides an opportunity to correct them before their impact is magnified by negative news in the press, customer rejection of an inferior product, and a diminished view of your brand, all of which could ultimately damage customer loyalty and even your stock value. The chain reaction doesn't stop there; these effects could in turn limit your ability to get additional financing as an organization, the perceived risk could elevate interest rates on your company debts, and this could reduce budgets across the organization, limiting the very research and development budget that gives rise to the new, innovative, or breakout products that will gain market share.

Viewed in this light, it could be a very positive development that the faults in the software were detected before release. In addition, by learning to view information in a dispassionate way, noting that there is more than one way to interpret much of what we gather as data, you as a business professional can enhance your ability to see new approaches to products or services.

Thomas Kuhn, author of *The Structure of Scientific Revolutions* (1996), (Kuhn, T., 1996) states that communities operate on a set of beliefs. These beliefs form the foundation of the community, business, and organization. Employees and customers alike become socialized, learning the values, meaning, behaviors, cultural customs, expectations for excellence, and brand associations through interaction with the community. In business, we can clearly see the example of new employees becoming socialized into the company culture; they are training, learning about their jobs, and getting to know their coworkers.

We can also see how a customer interacts with a product or service, and comes to associate feelings, ideas, and expectations with a brand or company. This foundation or set of actualized beliefs becomes the norm or the status quo, and can become static or fixed. If a certain process is successful and an individual or company is rewarded, the process is often repeated. If a customer buys a certain product that works as they anticipate it will, they are more likely to make a similar purchase decision in the future.

Kuhn discusses research and the scientific method as a process that can affirm the status quo, but can also produce an anomaly, or something that doesn't fit, challenges the existing norm, or stands apart from the anticipated results (Kuhn, T., 1996). This anomaly can challenge the status quo, and may not be greeted with open arms. Instead, it may be ignored or dismissed as irrelevant, but nothing could be further from the truth. As Kuhn (1996) notes, this outlying information that challenges the norm is precisely the necessary ingredient for a paradigm shift, or a change in overall view. The view itself can be as simple as the new awareness that a product has more uses than originally anticipated, or as significant as a new awareness of the brand and the company focus.

Is there a better way to produce a product? Is there a new feature that customers want? You'll never know if you don't ask, and you'll never improve or change if you don't listen to the feedback.

One story that articulates this power of the anomaly, of unanticipated information that results in a change in view, involves a common business product. A research chemist for the 3M Company, Spencer Silver, was used to trial and error as he pursued his goal of a new superglue (Kuhn, T., 1996). By mixing simple organic compounds in unusual ratios, he tried to create this superstrong glue, but one result in particular was a spectacular failure. This particular result, a polymer, would stick to many surfaces, but it was also easy to remove, leaving no trace of itself. This odd substance was considered useless until Arthur Fry, a fellow 3M scientist, found a new use for it: removable paper notes that could be used to mark pages in his hymnal when he sang in his church choir. Minor modifications resulted in sample note pads that were passed around at 3M, and soon a new form of written communication and information organization was created: the now-famous Post-it brand note (3M Company, 2009). Silver and Fry could have dismissed the negative result as a failure to reach the established goal of inventing a super glue, but by undergoing a paradigm shift, they revolutionized business communication. Learning to be open to information that challenges your views is a key business skill.

This now brings us to the question of how we elicit negative news, critical feedback, and assessment information. How do you learn more about the people around you? You watch, listen, and ask questions. Asking questions while watching, listening, and learning is the foundation of eliciting feedback. We can ask questions in interpersonal interviews, in small groups, and even large groups in person. We can use technology to help gather and process information, categorizing and classifying it. We can also create surveys with questions designed to elicit specific types of information.

Academic research often uses the terms "qualitative" and "quantitative" to categorize two types of information gathering. Qualitative research involves interactions, which by their very nature are subject to interpretation and, as a result, are less reliable and statistically valid. Their strength is in the raw data, the proximity to the source, and the possibility of unexpected results. The weakness in the results is often the inability to replicate the results the same way again. An example may be a focus group, where participants try a new beverage and report their experience in words and nonverbal expressions. By recording the group, we can replay and study their response to the new drink, and learn that many of the participants perceive it to be sour from their facial gestures. The written responses may not indicate this response to the same degree, and the recorded responses may portray a different story. If you replicate the focus group with new participants, you may very well have a different outcome.

Over time, patterns may emerge that produce reliable results, and indeed double-blind studies for many pharmaceuticals use a similar approach, but the number of participants has to be significantly increased while the confounding factors, or factors that can alter the results, must be anticipated and controlled. All of this involves a cost, and not every product, service, or study needs this type of investigation.

Quantitative research involves investigation and analysis of data and relationships between data that can be represented by numbers. The categorization and classification from the moment the investigation means that some aspects of the raw data will be necessarily lost in the process, but the information that remains will have a reliability and validity that compensates for this loss. Indeed, quantitative measures and representations of data are increasingly the norm in business communication, and are used to make decisions at all levels.

If your company produces automobiles, you may want qualitative information from potential consumers on their impression of the placement of the cupholders, but you will probably prefer quantitative information when it comes to engineering and safety. As you stress-test the steel in crash tests, assessing the force of the impact, the displacement of parts of the car as the crumple zones deform to absorb the energy, and the relative location of the crash-test dummy driver to the crush zone, you will measure it in terms of numbers. Each time your repeat the test, you should see similar results. If you don't, you may need to test the welds and examine the production process to determine why there is an inconsistency. You may even need to test the steel itself to see if it is a materials issue, rather than a process and production problem. All this information would be measured in terms of numbers and symbols, representing velocity, tensile strength, and related factors.

Another factor in gathering feedback is confidentiality. Before you consider how to ask questions, you may want to consider to what degree you want identifying information in the process. If you are designing a campaign where employees submit suggestions to save the company money, increase production, or improve quality, and want to offer a financial incentive for ideas that are adopted, you will need to be able to identify the contributing employee for the reward. On the other hand, if you want a feedback system for employees to report coworkers who are under the influence or have substance abuse problems on the job, threatening the safety of all, then you would want an anonymous 1-800 number to give out, and to encourage its use by assuring employees that it carries no identifying markers.

Anonymous surveys can elicit information that would not be revealed otherwise, but they can also be a place for employees to vent, exaggerate, or invent responses. The validity is an issue, but the opportunity for insight may outweigh the risks. You can also provide an optional opportunity for the employee or customer to self-identify by providing a place where they could indicate contact information. A customer that completes a postpurchase survey may be offered a coupon if they register, and that contact information may be useful for follow-up contacts. Some customers will prefer, however, to write a direct complaint without identifying themselves. When designing a survey, brochure, or procedure to elicit feedback, you need to consider identification and anonymity.

In order to gather information, we often ask questions. For this application there are two types of questions: open and closed (Fink, A., 1995). Open-ended questions allow for interpretation and a range of responses in the respondent's own words. Closed-ended questions limit the responses to a preselected range of options or choices. Your choice of open or closed questions depends on what type of information you plan to gather.

Open-ended questions may sound like the following:

1. What do you like about the product?
2. How was the service today?
3. How does the product make you feel?
4. What does our brand mean to you?
5. Why did you choose our product?

In each case, the question can be answered many ways, depending on the word choice of the respondent. The value is placed on the personal response and the range of data gathered may well be quite diverse, presenting challenge to categorize and group. Open-ended questions cannot be answered with a simple yes or no response.

Closed-ended questions, however, can be answered with a yes/no response. Here are five examples of closed-ended questions:

1. Have you purchased our product previously?

   ___ Yes

   ___ No

2. Why did you choose our product?
   1. Price/low cost
   2. Quality
   3. Reputation
   4. Previous experience
3. How was the service today?

1	2	3	4	5
Poor	Below average	Neutral	Good	Excellent

4. What do you like about the product? (Please indicate in rank order.)

   ___ Low cost

   ___ Quality

   ___ Reputation

   ___ Features

___ Low maintenance

5. Please indicate the year you were born.

____

The first closed-ended question is simply a closed question with its yes/no response options, but it is also an example of a categorical question. Categorical questions limit the responses to two categories. For example, you may ask a customer to indicate their sex in the response survey, allowing them to choose from two categories: male or female. Multiple choice questions allow for specific choices and limit the range of options. Likert Scale questions allow for the conversion of feelings, attitudes, and perceptions into numbers in a range. Ordinal questions request the respondent to rank order specific options. Numerical questions request a specific number, often a birth date or a serial number, that itself carries meaning. For example, age may be correlated to disposable income, and while the respondent may not be willing to respond to a direct question about their income level, they may be willing to indicate their year of birth.

To summarize the pros and cons of the two basic question types: open-ended questions are best when you want all possible responses in the respondent's own words. Closed-ended questions limit the responses to a few choices, and they can be categorized, placed in order, assess degrees of attitudes and feelings, and request specific information (Fink, A., 1995).

Key Takeaway

Eliciting negative news through feedback is an important way to avert problems, safeguard valuable relationships, and achieve paradigm shifts. Feedback may be qualitative or quantitative and may be requested through open-ended or closed-ended questions.

Exercises

1. Describe a time when you received negative feedback in time to correct your error. How did you feel about the correction at the time? Looking back, how do you feel about it in retrospect? Discuss your thoughts with a classmate.
2. Find a negative message online and write a brief review. Share and compare with classmates.
3. Prepare a sample customer satisfaction survey with at least ten questions. Make sure you include a couple of questions to learn more about your audience as well as their opinions of the product or service. Post your results in class and compare them with classmates.

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3.2.3: Crisis Communication Plan

Learning Objectives

1. Understand how to prepare a crisis communication plan.

A rumor that the CEO is ill pulls down the stock price. A plant explosion kills several workers and requires evacuating residents on several surrounding city blocks. Risk management seeks to address these many risks, including prevention as well as liability, but emergency and crisis situations happen nevertheless. In addition, people make errors in judgment that can damage the public perception of a company. The mainstream media does not lack stories involving infidelity, addiction, or abuse that require a clear a response from a company's standpoint. In this chapter we address the basics of a crisis communication plan.

Figure 3.2.3.2: Crisis communication requires efficiency and accuracy. Danny Howard – Bush: Worst Disaster – CC BY-NC 2.0.

Focus on key types of information during an emergency: (Mallet, L., Vaught, C., and Brinch, M., 1999)

- What is happening?
- Is anyone in danger?
- How big is the problem?
- Who reported the problem?
- Where is the problem?
- Has a response started?
- What resources are on-scene?
- Who is responding so far?
- Is everyone's location known?

You will be receiving information from the moment you know a crisis has occurred, but without a framework or communication plan to guide you, valuable information may be ignored or lost. These questions help you quickly focus on the basics of "who, what, and where" in the crisis situation.

Developing Your Crisis Communication Plan

A crisis communication plan is the prepared scenario document that organizes information into responsibilities and lines of communication prior to an event. With a plan in place, if an emergency arises, each person knows his or her role and responsibilities from a common reference document. Overall effectiveness can be enhanced with a clear understanding of roles and responsibilities for an effective and swift response.

The plan should include four elements:

1. Crisis communication team members with contact information
2. Designated spokesperson
3. Meeting place/location
4. Media plan with procedures

A crisis communication team includes people who can

1. decide what actions to take,
2. carry out those actions,

3. offer expertise or education in the relevant areas.

By designating a spokesperson prior to an actual emergency, your team addresses the inevitable need for information in a proactive manner. People will want to know what happened and where to get further details about the crisis. Lack of information breeds rumors, which can make a bad situation worse. The designated spokesperson should be knowledgeable about the organization and its values; be comfortable in front of a microphone, camera, and media lights; and be able to stay calm under pressure.

Part of your communication crisis plan should focus on where you will meet to coordinate communicate and activities. In case of a fire in your house, you might meet in the front yard. In an organization, a designated contingency building or office some distance away from your usual place of business might serve as a central place for communication in an emergency that requires evacuating your building. Depending on the size of your organization and the type of facilities where you do business, the company may develop an emergency plan with exit routes, hazardous materials procedures, and policies for handling bomb threats, for example. Safety, of course, is the priority, but in terms of communication, the goal is to eliminate confusion about where people are and where information is coming from.

Whether or not evacuation is necessary, when a crisis occurs, your designated spokesperson will gather information and carry out your media plan. He or she will need to make quick judgments about which information to share, how to phrase it, and whether certain individuals need to be notified of facts before they become public. The media and public will want to know information and reliable information is preferable to speculation. Official responses help clarify the situation for the public, but an unofficial interview can make the tragedy personal, and attract unwanted attention. Remind employees to direct all inquiries to the official spokesperson and to never speak "off the record."

Enable your spokesperson to have access to the place you indicated as your crisis contingency location to coordinate communication and activities, and allow that professional to prepare and respond to inquiries. When crisis communication is handled in a professional manner, it seeks not to withhold information or mislead, but to minimize the "spin damage" from the incident by providing necessary facts, even if they are unpleasant or even tragic.

Key Takeaway

Because crises are bound to happen despite the best planning, every organization should have a crisis communication plan, which includes designating a crisis communication team and spokesperson.

Exercises

1. Locate the crisis communication plan where you go to school or work, or find one online. Briefly describe the overall plan and please note at least one part, element, or point of emphasis we have not discussed. Post and compare with classmates.
2. When people don't know what to do in a crisis situation, what happens? How can you address probable challenges before the crisis occurs? Discuss your ideas with classmates.
3. As a case study, research one crisis that involves your area of training or career field. What communication issues were present and how did they affect the response to the crisis? Compare your results with classmates.
4. Locate a crisis communication online and review it. Share and compare with classmates.
5. Do you always have to be on guard with members of the media? Why or why not? Explain your answer to the class as if they were members of the media.

References

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3.2.4: Press Conferences

Learning Objectives

1. Discuss the purpose of a press conference.
2. Discuss how to prepare and conduct a press conference.

Holding a press conference when you are unprepared can feel like standing in front of a firing squad, where all the journalists are armed so no one will carry the guilt of the winning shot. It can make you nervous, scared, and reluctant to speak at all. It can take your fear of a misquote, or a stumble, or a misstatement replayed across the Internet thousands of times in the next twenty-four hours and make you wish for a blindfold and a cigarette, but that won't help. The way to calm your nerves is to be confident in your material. This section discusses the press conference, from preparation to execution (pun intended).

A press conference is a presentation of information to the media. It normally involves a written statement that is read exactly as written and is followed by questions and answers. The press conference normally requires a seasoned representative of the company or business with established credibility and integrity. It also requires a sense of calm in the confidence that you know your material, know how to tactfully say you don't know or don't wish to comment, and a sense of humor to handle the "gotcha" questions.

Press conferences can be held for positive news like the announcement of a new hospital wing that will increase the health care services available to the community. It can also be held to clarify information regarding the CEO's trip to Chile with an alleged mistress, the recent law enforcement sting operation on the illegal sale of controlled substances from the hospital, or to announce the layoff of employees as part of a reduction in force.

Positive or negative, your role as a speaker at a press conference is to deliver the prepared message and to represent the business or organization in a professional manner. You understand that there may be moments of tension, but you also know you have a choice in how to respond. First we'll examine preparation, then discuss the actual press conference.

You should have a good reason for holding a press conference. Wasting the media's time on a frivolous issue will only set you up for challenges later on. You should also have a brief prepared statement that you will read and restate if necessary. Today's press conference messages are often drafted by someone in public relations or media, and reviewed by legal counsel when warranted. If the task falls to you, keep it short and simple, addressing the following:

- Who?
- What?
- Where?
- When?
- How?
- Why?

As a follow-up to why the press conference needs to occur in the first place, you need to consider the location. If it is a ribbon-cutting ceremony, the choice is obvious. If the announcement is less than positive, and you've been instructed by your supervisors or counsel to not offer additional remarks, you'll want a podium strategically located next to a stage exit. Your press release or invitation to the media will contain the time, date, and location of the press conference, and may contain a title or subject line as well as contact information for follow-up information.

As you prepare your background materials, learning as much as needed for the announcement, you may also want to consider using a moderator. Perhaps that will be your role as you introduce senior management to read the prepared statement. A moderator can serve to influence the process and redirect if questions go off topic or if a transition is needed. A moderator can also call a formal close the press conference and thank everyone for attending.

Finally, visual aids are an excellent way to reinforce and communicate your message. They need to be big, they need to be relevant (not just decorative), and (from a technical standpoint) they need to work. If they will be projected onto a screen, make sure the screen is available (not stuck), the laptop has power (as well as battery backup), the presentation or visual aid is on the laptop, and that the projector can and does project what you want it to. Don't forget sound equipment if necessary, and make sure everything works the day of the presentation.

Holding a Press Conference

Someone should be designated as the greeter for the media. Be ready at least fifteen minutes before the scheduled time of the event. Provide each member of the media with a print copy of the actual statement that will be read before or after the event. If there is an element of surprise, you may want to hold the copies of the statement back until after the press conference has been concluded, but otherwise distributing them beforehand is standard.

The moderator opens the press conference with a welcome, indicates the purpose of the press conference and reminds everyone that there will (or will not) be an opportunity for questions following the press conference. The moderator introduces the spokesperson who will read the statement and welcomes him or her to the podium. The moderator may need to assist with sound equipment but otherwise stands back but near the speaker.

The speaker will read the statement. If there are to be no questions, the moderator will retake the podium and indicate that press kits, containing background material, fact sheets, the news release, sample photos, or related materials will be available; or simply indicate that copies of the press release are available at the back of the room. If there are questions, the moderator may still take the podium and outline ground rules for questions such as: they should pertain to the subject, be brief, and may or may not include follow-up questions. Members of the media will often ask a question and state that they have a follow-up question as a way of reserving two turns.

The moderator may indicate which member of the media is to ask a question, and typically they will stand and address the speaker directly. The speaker can take notes, but this isn't common. Instead, they should be aware that every movement is being recorded and that by maintaining eye contact, they are demonstrating that they are listening. They may reiterate the statement from the press release or refer to the background material, but should limit the scope of their response. Your team may have anticipated several questions and the speaker may have several sound bites ready to deliver. Visual media will want it visual, audio will want clarity, and print will want descriptive quotes. Meet the needs of your audience as you deliver your message.

Invariably the "gotcha" question, or the question that attempts to catch the speaker off guard, will be asked. "We're not ready to discuss the matter at this time," "When more information becomes available we will let you know," "Our company has no position on that issue," or "We're not prepared to speculate on that issue at this time" are all common response phrases. Don't use "I think," "I believe," or "I don't know" comments as they invite speculation, and refrain from "no comment" if at all possible as it is increasingly perceived as if the company or representative is "hiding something."

You want to appear professional, knowledgeable, and credible—not as if you are sneaking or hiding something. Don't display a nonverbal gesture or make a face at a question, as this can also be misinterpreted. Keep your poise and balance at all times, and if you are the speaker and the question puts you off, establish eye contact with the moderator. Their role is to step in and they may move to the conclusion.

Never say anything you wouldn't want the world to hear, as microphones are increasingly powerful, video captures lips movement, and there will be a communication professional available to analyze your nonverbal gestures on the evening news. Being cool, calm, and collected is the best policy whether you are delivering positive or negative news.

Key Takeaway

A press conference is an important presentation of information that requires you to anticipate questions and prepare possible responses.

Exercises

Your role as spokesperson is to write and present a prepared statement, and respond to no less than five questions. You will select one of the scenarios below based on your birth month, and prepare your statement. You are allowed to improve on facts, but should recognize that each scenario is serious and treat the assignment with professionalism.

1. January—Healthcare, Inc.

A hacker illegally accessed thousands of the new digital health care records on file with Healthcare, Inc. and posted them directly to the Internet in an early morning protest against invasion of privacy. The hacker has not been identified, but local law enforcement is on the scene investigating the incident and the offending Web sites have been taken offline. Your company has received hundreds of calls concerning the incident. The federal government required the conversion to digital records last year, and your company complied with the order. Your company used a government-approved vendor for a no-bid installation of hardware and software to secure the digital records. You represent Healthcare, Inc.

2. February—Educational Services, Inc.

Half the senior class in your private magnet high school cheated on the graduation exam, and the rest were apparently aware of the cheating, as were many of the parents. An employee, a secretary with several employee passwords, allegedly gained access to the exam before its release and provided the questions and responses to her son, who then provided it to his friends. The employee was often provided login names and passwords to facilitate records processing for several administrators when they were off site, often at conferences. Headquarters wants to minimize the publicity but cannot in good faith issue diplomas to students who cheated. The employee has been dismissed for conduct, and an investigation is underway, but graduation is next week and the evidence against the cheating seniors is clear. They won't be receiving their diplomas unless they pass an alternate version of the test that won't be ready for sixty days. You represent Educational Services, Inc.

Exercises (cont.)

3. March—Software, Inc.

Your company recently released its latest version of a popular business and industry software program. Programs always have a few bugs or problems upon release, even after the most rigorous laboratory testing, but this program is apparently infested with bugs. Stories are popping up across the Internet about how the program doesn't work, or specific features don't work, and your customer service team has been responding to customer complaints. The software designers report it is an exaggeration to say "infested," and point out that in all the trial tests it has worked perfectly. Your company is working on finding and addressing the issues, and is ready to create patch programs and issue refunds if necessary, but wants to prevent a recall and a loss of consumer confidence. You represent Software, Inc.

4. April—Electric Company, Inc.

An employee was consuming alcohol on the job and failed to adjust the voltage regulator. The voltage was increased by a considerable amount, causing several house fires, significant loss of property (appliances) and the death of an eleven-year-old child. The local media interviewed the employee's spouse who stated the employee was working a double shift, that they had called someone to relieve them, and no one came. Your company is investigating, but has no new information. You represent Electric Company, Inc.

5. May—Online Market, Inc.

An online marketplace company has been accused by law enforcement of knowingly allowing users to sell stolen goods on their Web site. Since the company never handles any of the goods themselves, and simply facilitates the exchange of goods between buyer and seller via the short-term creation of a Web page with text and images provided by the seller, the company denies all responsibility. You represent Online Market, Inc.

6. June—ABC Engineering, Inc.

A 4.2-million-dollar, two-lane bridge recently completed collapsed into the local Blue River, taking with it three vehicles. The loss of life included four men, three women, and one unborn baby. Local media has interviewed workers who indicated they were rushed to complete the bridge to get a bonus for the construction firm. The construction firm indicates that their internal investigation points to a faulty design, but the architects, engineers, and government inspectors deny the charge. You represent ABC Engineering.

7. July—Package Delivery, Inc.

A class-action lawsuit has been filed in federal court against Package Delivery, Inc. A group of employees, all female, allege sexual harassment and discriminatory promotion practices against the company. They cite photos and calendars of a sexual nature hung in the workplace and allege that male colleagues with less seniority were promoted ahead of the female workers. You represent Package Delivery, Inc.

8. August—Hamburgers, Inc.

Hamburgers, Inc. is pleased to announce a new menu practice where the nutritional information and the calorie counts will be prominently displayed, helping consumers make healthy choices from the menu. Your supervisors have heard that there may be representatives of the Cow Liberation Group (which advocates vegetarianism) and several nutritionists (who perceive the company has not done enough to improve its products) at the press conference. You represent Hamburgers, Inc.

9. September—Headache Pills, Inc.

A person in New York died of cyanide poisoning, supposedly after taking a 200-mg Headache Pill made by your company. Your headache pills come in sealed, tamper-resistant packaging with child-proof protective caps. Some stores are voluntarily taking your product off the market. The U.S. Food and Drug Administration has announced an investigation, and the family of the person who died has threatened to sue. You represent Headache Pills, Inc.

10. October—Maisy Mayflower, Star Actress

You represent Maisy Mayflower as her spokesperson. She has recently returned from Bolivia where she adopted a two-year-old child. She already has three adopted children representing several countries. She is not married. Upon her return, a man claiming to be the child's father came forward to the media in La Paz, Bolivia protesting the adoption, and the U.S. media has picked up on it. It is all over the Internet. The Bolivian government issued a statement that while they cannot confirm the legitimacy of his claim, the father of the child did not present himself at court during the announced hearing, nor did he present himself in the six months preceding the adoption. The child was legally declared abandoned, and legally adopted. You represent Maisy Mayflower.

11. November—Fast Food Restaurants, Inc.

A customer reported finding a severed human fingertip in soup purchased from Fast Food Restaurants, Inc. The soup and sandwich package was purchased at a Fast Food Restaurant as a take-out order. Your company has several quality controls in place to prevent accidents like this. Local law enforcement is investigating. The customer has taken pictures and posted them all over the Web, and made both libelous and slanderous comments against your company in media interviews and blogs. The customer has never been an employee of Fast Food Restaurants or its affiliates. You represent Fast Food Restaurants, Inc.

12. December—Congressman "Honest" Abe Johnson.

The honorable Congressman from the State of Denial was apprehended in Ecuador for solicitation of a minor. The local media reports that a young girl approached him when he was with his traveling group and he offered to take a picture of her. The mother appeared, spoke to him, and slapped him in the face. She says the congressman offered her money for time alone with her daughter. The congressman stated to local law enforcement, according to a conversation with his spouse from jail, that all he did was compliment her on her daughter, something like "what a fine daughter you have," in his best Spanish. You represent the Congressman.

3.2.5: Additional Resources

"Good Ways to Deliver Bad News" by Curtis Sittenfeld from *Fast Company*.www.fastcompany.com/36993/good-ways-deliver-bad-news

"How to Deliver Bad News to a Group" by Kevin Daley, a Harvard Business article. https://hbr.org/2009/10/how-to-deliver-bad-news-to-a-g

How to deliver bad news to your employees. https://hbr.org/2015/03/how-to-deliver-bad-news-to-your-employees

"Top 7 Ways To Elicit Constructive Web site Feedback" by Adam Senour. http://top7business.com/?id=555

Visit this Northern Illinois University site for a guide to preparing a generic crisis communication plan and adapting it to your needs. www3.niu.edu/newsplace/crisis.html

To see an actual crisis communication plan, visit this North Carolina State University Web site. www.cals.ncsu.edu/agcomm/PDFs/Crisis3.pdf

Western Organization of Research Councils presents "How to Hold a Press Conference." http://www.worc.org/userfiles/Hold-a-Press-Conference.pdf

SECTION OVERVIEW

3.3: Communicating Through Technology

3.3.1: Using Scheduling Platforms

Learning Objectives

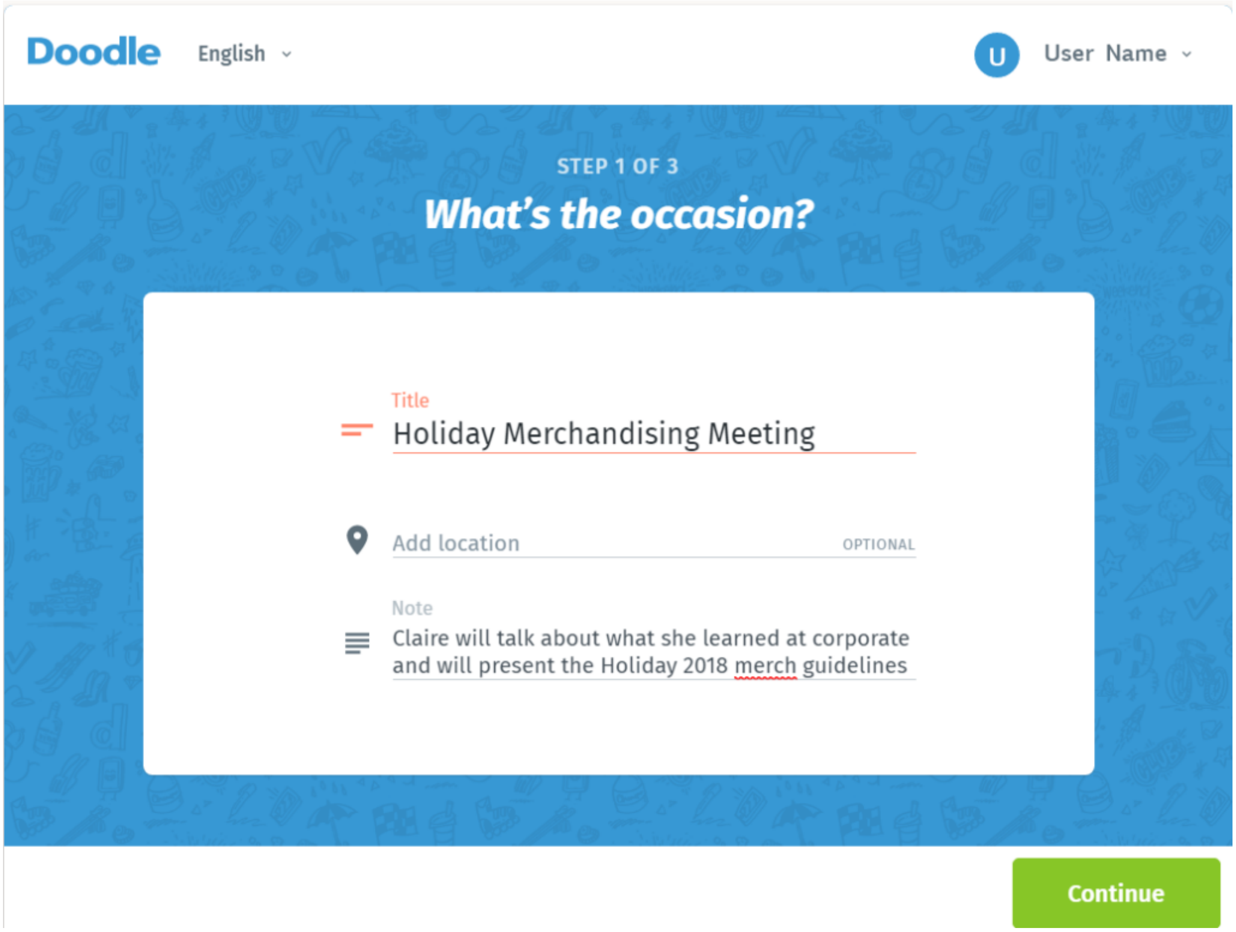
- Identify the best time for a meeting using Doodle or Calendly

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

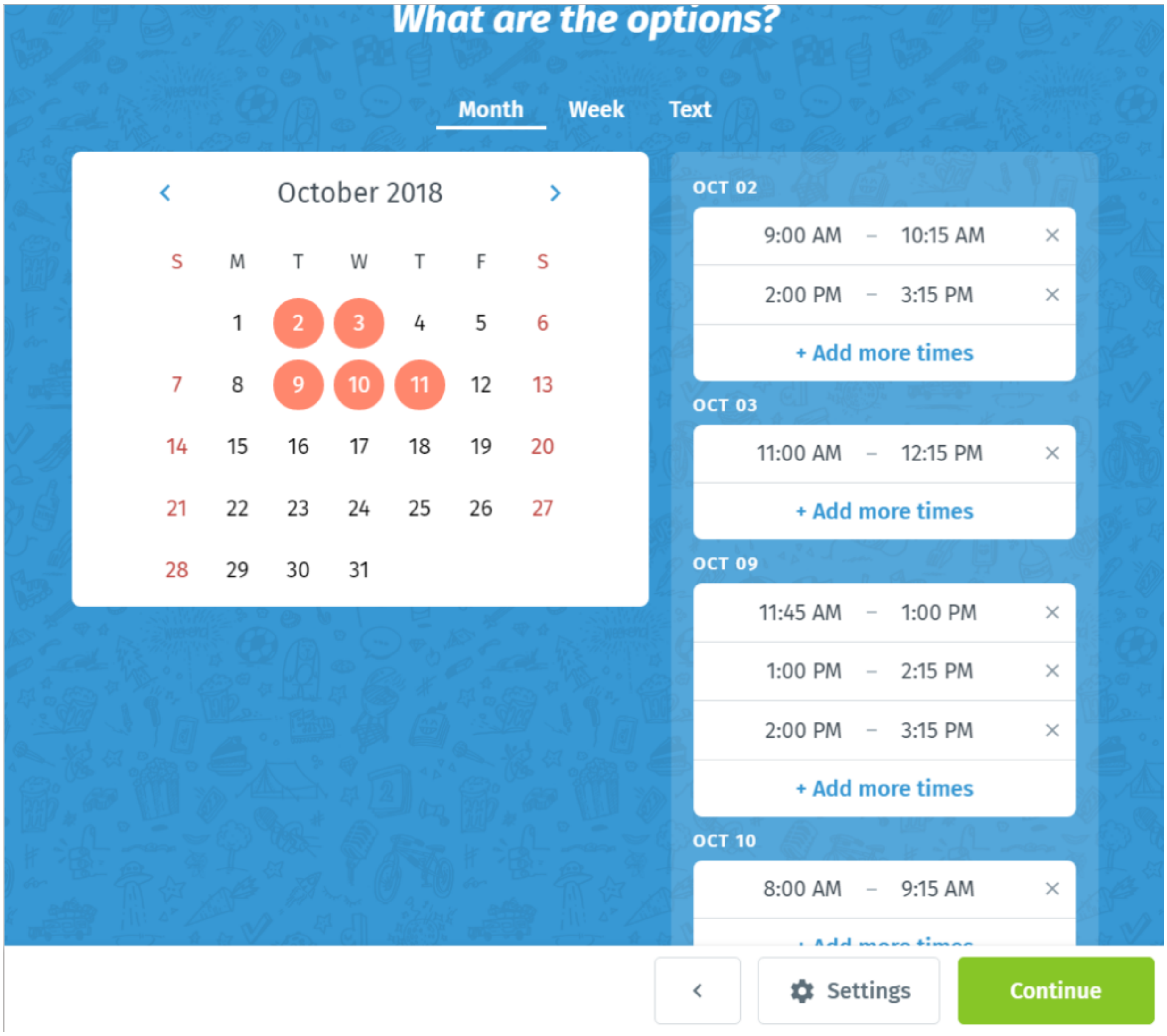
To create a scheduling question on Doodle for a meeting you are hosting or are responsible for scheduling, here are the steps to follow:

- 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.

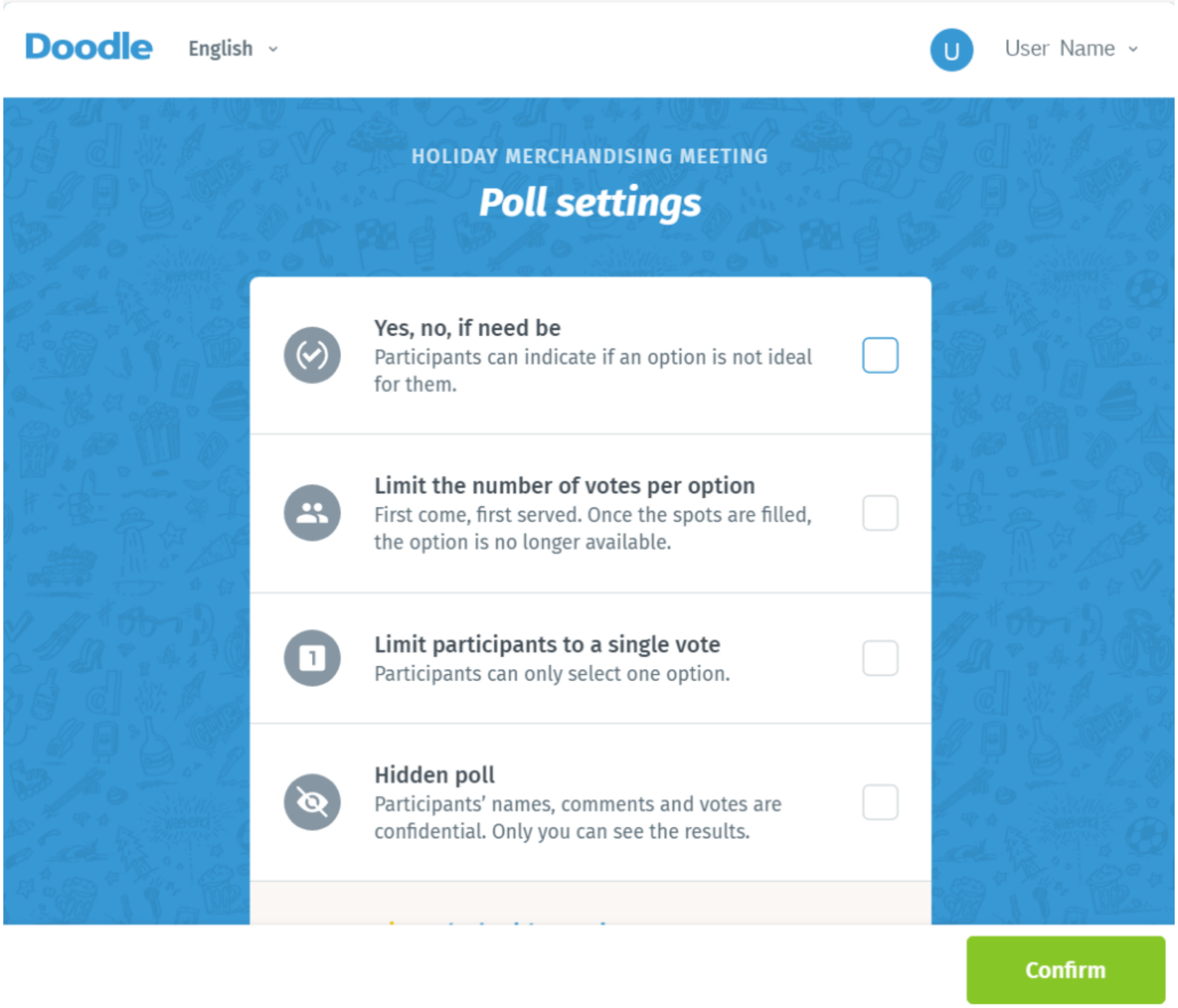


- Next, you'll see a calendar page that allows you to choose possible dates for the meeting. As you can see from the screenshot below, five dates have been selected.

- 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.

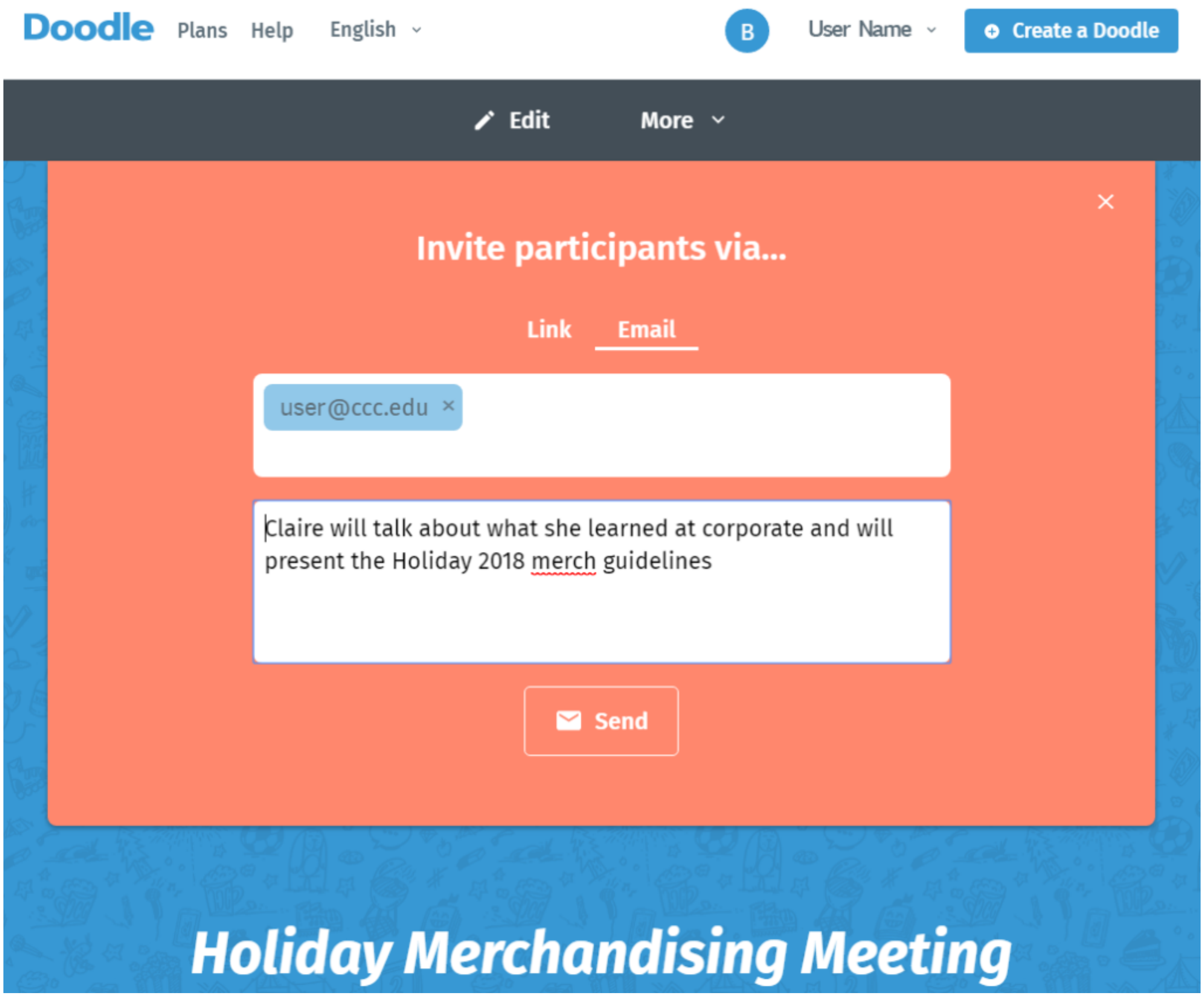


- At the bottom of this page, there's a button called Settings. Click on this to make some choices about how you want people to respond to your poll.

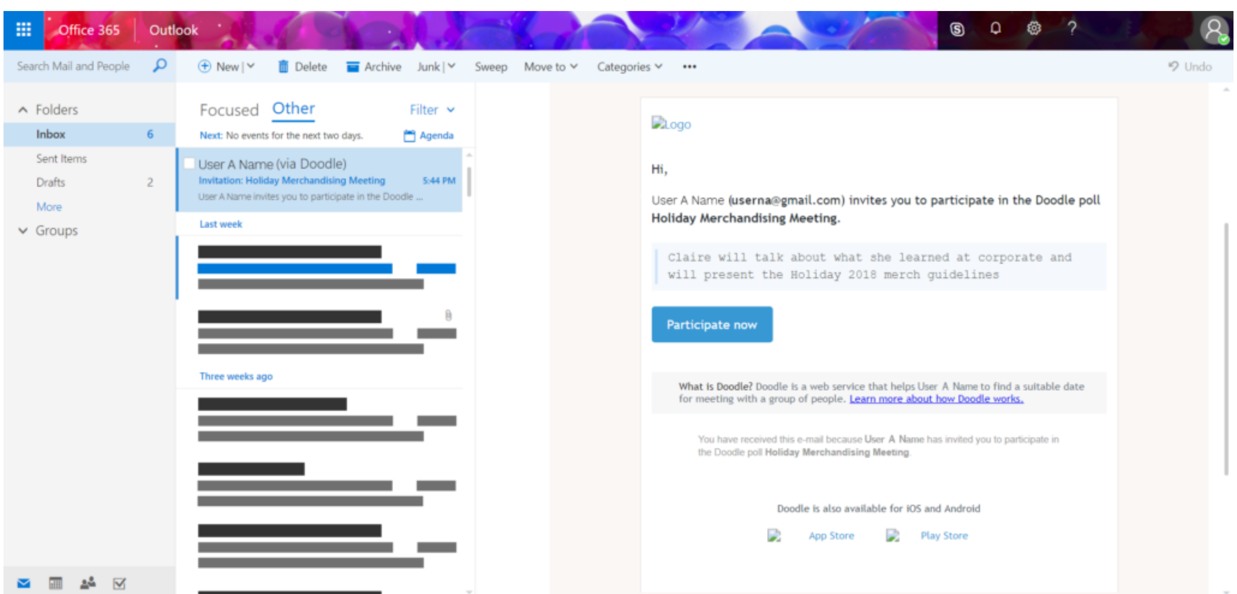


- The first option—"Yes, No, If need be"—lets you give participants the option to say, essentially, "I can come at 2:00, but it's not ideal for me." It's up to you whether you want to give people that choice.
- The next setting choice applies to situations like one-on-one meetings or activities where 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.

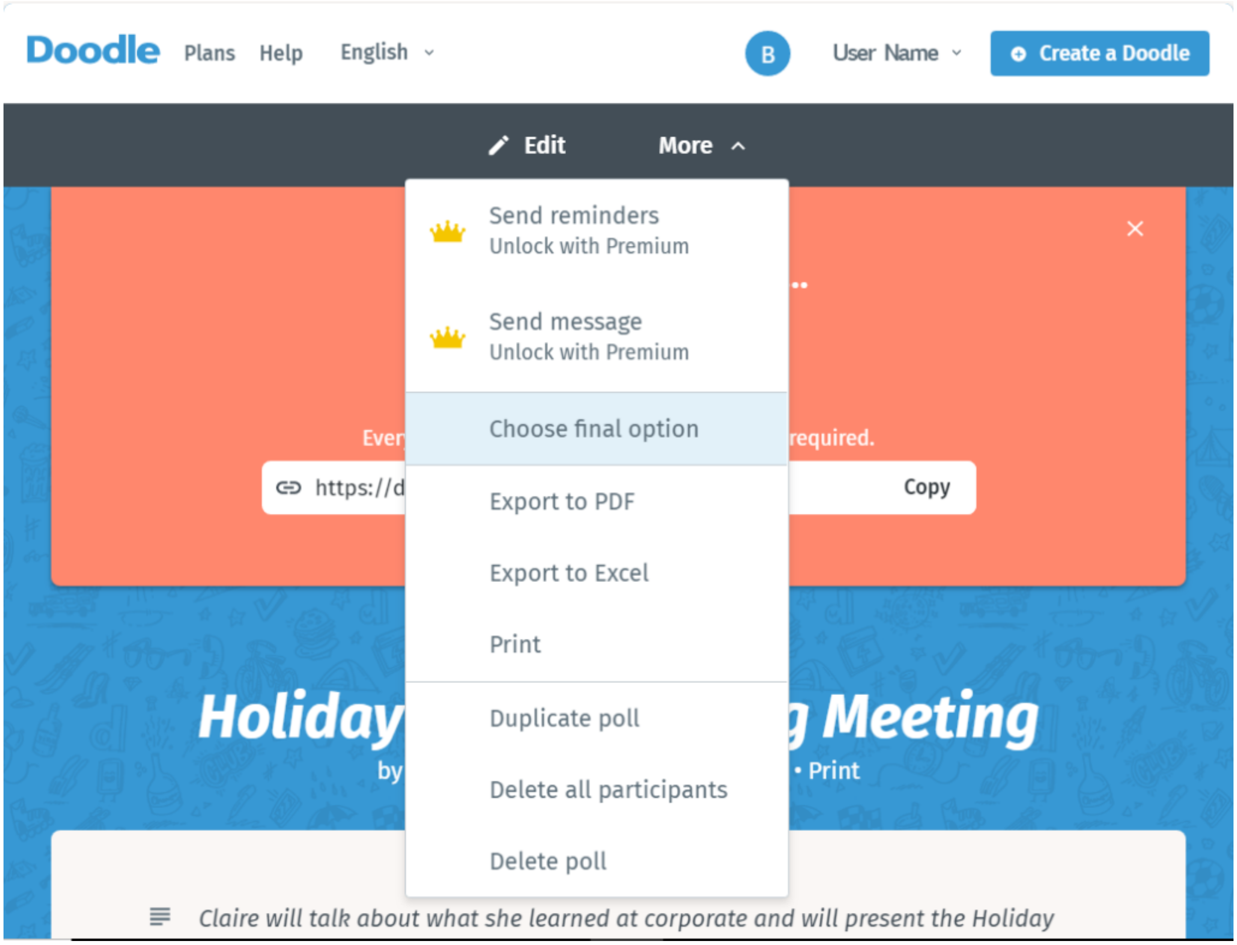


- Your participants will receive emails that look like this



- 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.



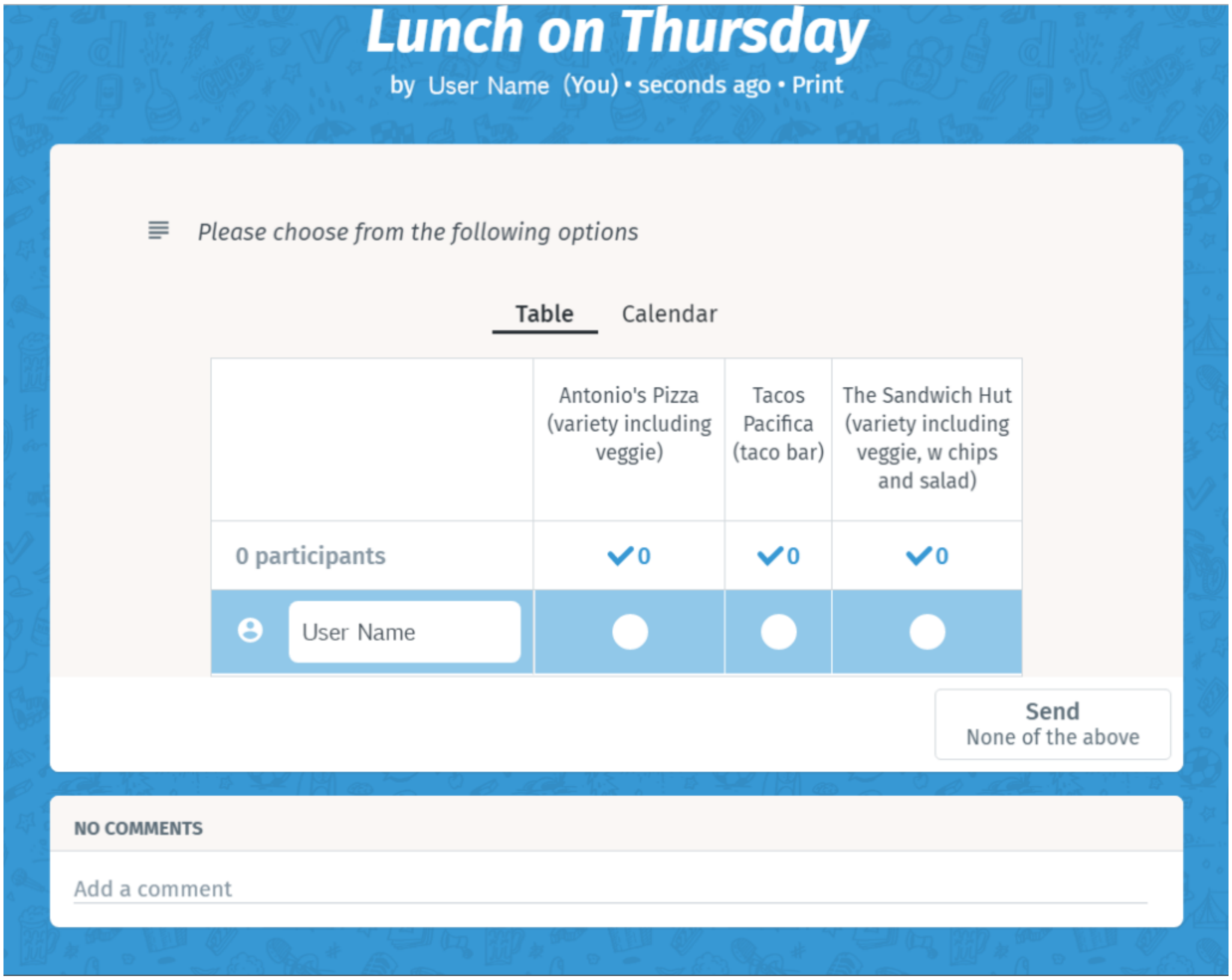
- Once everyone has responded to the poll, you can click on More at the top of the poll's main page. Then click Choose Final Option. This means that you've looked at the poll, seen when people are most likely to be available, and now you're ready to set the meeting time.
- The next screen will show you the final option you've chosen and offer to add it to your calendar.

Practice Question

https://assessments.lumenlearning.co...sessments/8633

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.

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3.3.2: Introduction to 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.

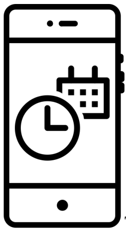
Contributors and Attributions

3.3.3: Using Technology for Meetings

Learning Objectives

- Explain the key principles involved in scheduling meetings that use audio, video, and web conferencing technology

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 worldtimeserver.com.

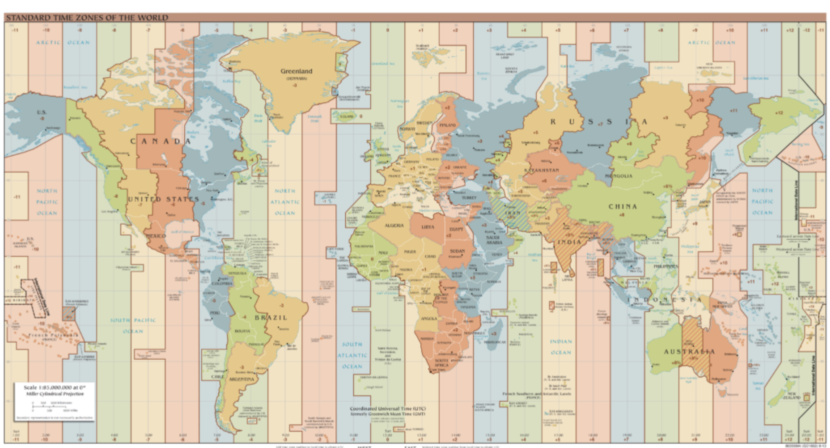


Figure 1. Standard World Time Zones.

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

https://assessments.lumenlearning.co...sessments/8634

3.3.4: Scheduling Remote Meetings

Learning Objectives

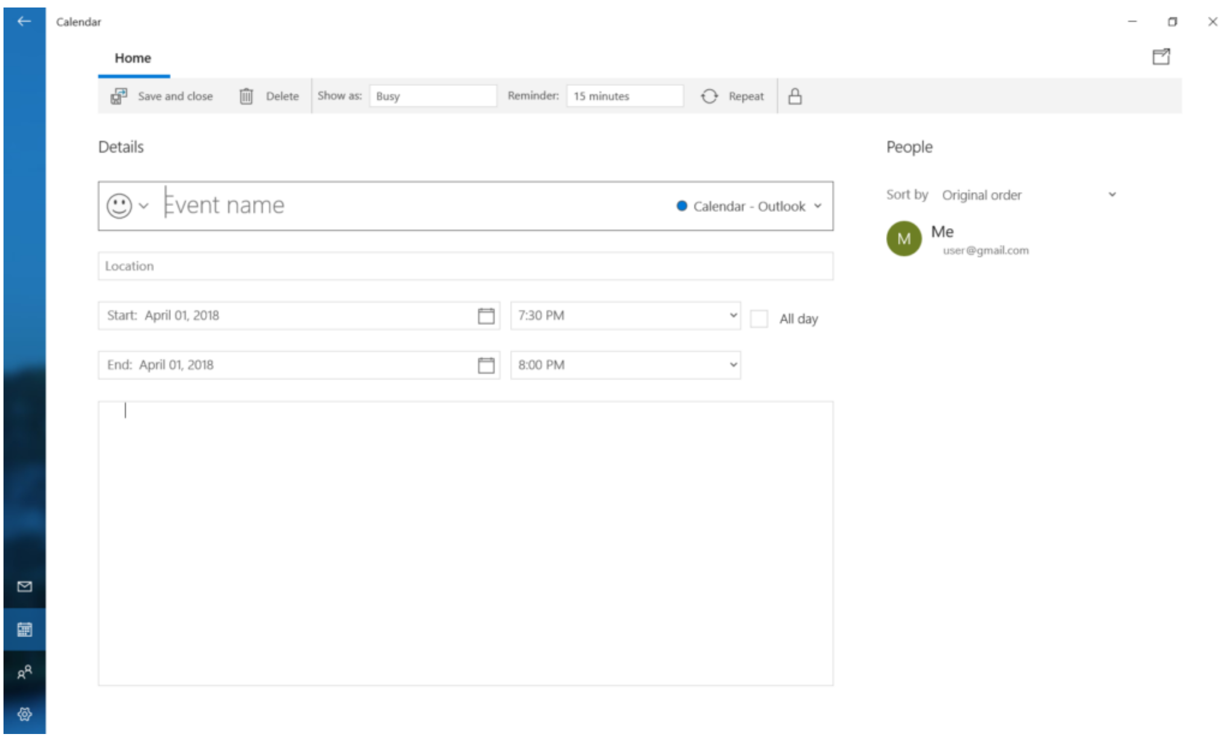
- Discuss best practices for scheduling remote meetings

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.

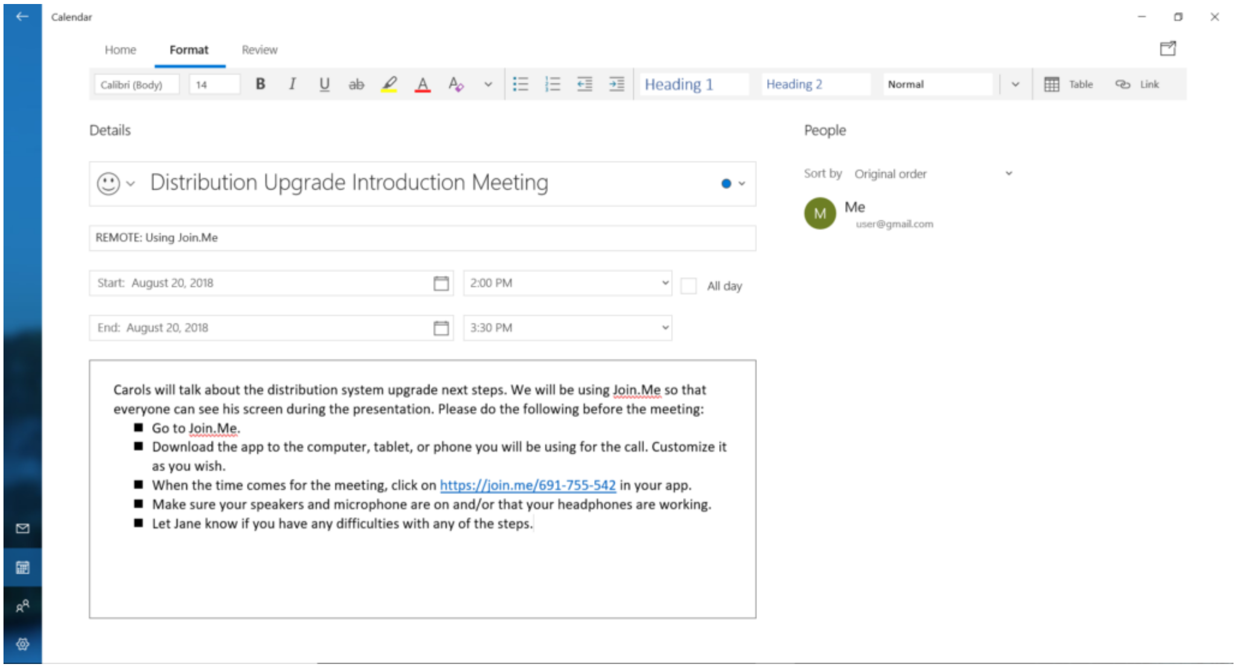
Once you have polled your participants and settled on a meeting date and time, you need to get the event on their calendars. Unlike a face-to-face meeting where all the information they need is the topic, date, time, and location, remote meeting invitations require more details.

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

https://assessments.lumenlearning.co...sessments/8635

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3.3.5: Introduction to 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.

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3.3.6: Using Audio in Business

Learning Objectives

- Recognize the strengths and weaknesses of audio in a business context

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

https://assessments.lumenlearning.co...sessments/8636

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3.3.7: Stages of a Telephone Call

Learning Objectives

- Identify the five stages of a telephone conversation

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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3.3.8: One-on-One Audio Calls

Learning Objectives

- Identify strategies to increase comprehension and reduce misunderstanding in one-on-one telephone / VOIP communications

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.

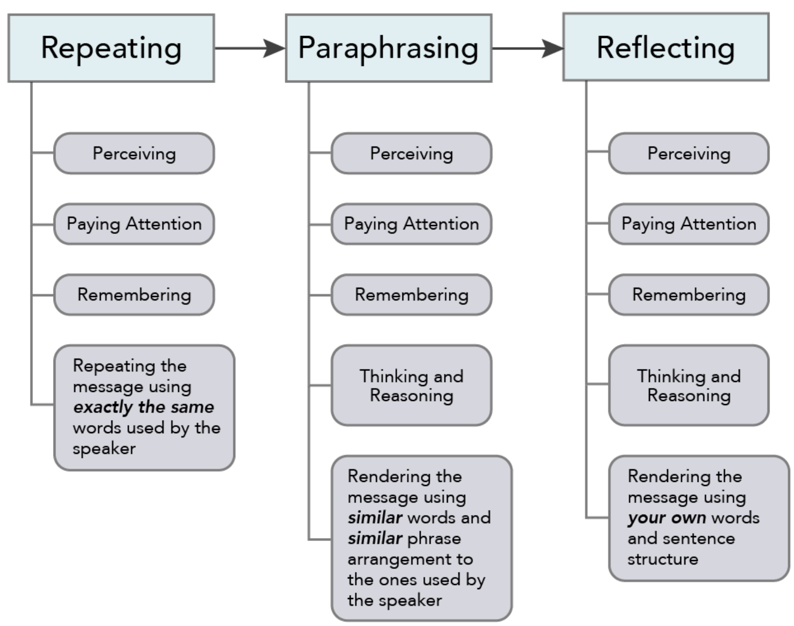

Figure 1. Degrees of Active Listening.

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 . . ."

Contributors and Attributions

3.3.9: Group Audio Calls

Learning Objectives

- Identify strategies to increase comprehension and reduce misunderstanding in group telephone / VOIP communications

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

https://assessments.lumenlearning.co...sessments/8639

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.

Contributors and Attributions

3.3.10: Audio Meetings

Learning Objectives

- Participate in a meeting with audio sharing components

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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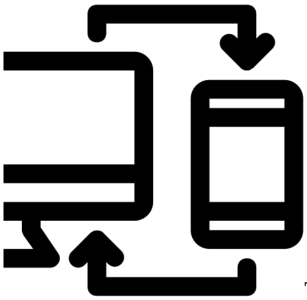
3.3.11: Why It Matters- Communicating Through Technology

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.

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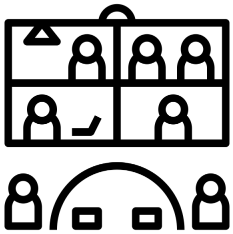
3.3.12: Introduction to Video Conferences

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.

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3.3.13: Using Video in Business

Learning Objectives

- Recognize the strengths and weaknesses of video in a business context

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

https://assessments.lumenlearning.co...sessments/8641

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.

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3.3.14: One-on-One Video Calls

Learning Objectives

- Identify strategies to increase comprehension and reduce misunderstanding in a one-on-one video call

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

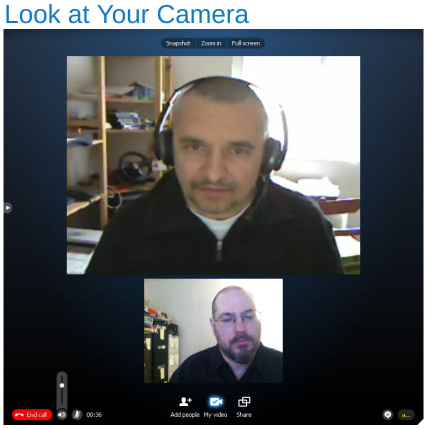

Figure 1. Pay attention to where you're looking!

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.

Avoid Moving Your Camera

Figure 2. Moving your camera can suddenly make your video call an unpleasant experience.

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.

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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3.3.15: Group Video Calls

Learning Objectives

- Identify strategies to increase comprehension and reduce misunderstanding in group video communications

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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3.3.16: Video Meetings

Learning Objectives

- Participate in a meeting with video sharing components

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 the textbook reading on 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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3.3.17: Introduction to 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.

Contributors and Attributions

3.3.18: Using Web Sharing in Business

Learning Objectives

- Explain when to use web sharing tools in a business context

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

https://assessments.lumenlearning.co...sessments/8645

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.

Contributors and Attributions

3.3.19: One-on-One Web Sharing Calls

Learning Objectives

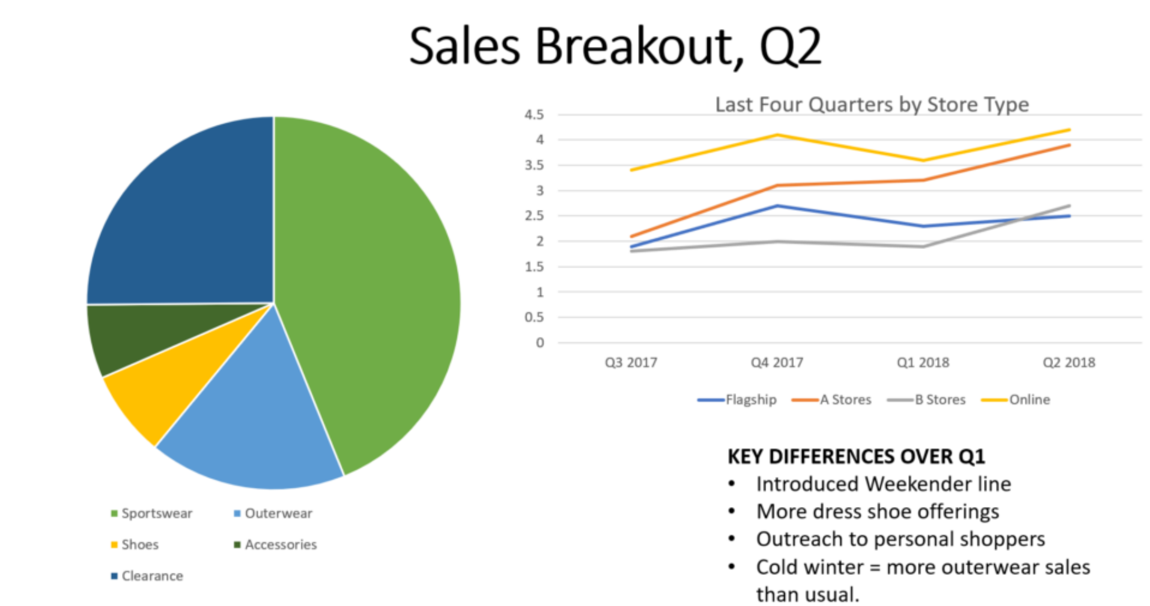
- Explain when to use web sharing tools in a business context

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."

Goal	Dialogue
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

https://assessments.lumenlearning.co...sessments/8646

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.

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3.3.20: Group Web Sharing Calls

Learning Objectives

- Identify strategies for effective use of web sharing in a group setting

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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3.3.21: Web Sharing Meetings

Learning Objectives

- Participate in a meeting with web sharing components

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

https://assessments.lumenlearning.co...sessments/8648

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3.3.22: Introduction to 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.

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3.3.23: 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.

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3.3.24: Assignment- Communicating Through Technology

Imagine the small business you have been working for has gained traction in the market, and you are considering expanding. The distance between your new businesses, however, will make face-to-face meetings with key managers inconvenient. You have been charged with finding a way for the company to conduct synchronous meetings in an efficient, effective manner while keeping costs to a minimum.

Communication Services Research:

Your task is to search the internet and find two free or low-cost online communication services to present as options to your manager. Prepare a summary along with a chart comparing the different features such as: cost, ease of use and setting up an account, number of users allowed, and technology required to operate. You may also list any specifics about screen sharing capabilities, video conferencing, and recording conference, etc.

Once you have conducted your research, you will be assigned to a group with 3–4 other students to conduct a video or phone conference on the assigned topic to share your findings.

Before your call your group must:

1. Schedule a time for all of your group to meet. When you have established a time create a Google calendar event and invite each member of the group AND the instructor to save that time. (You instructor will not participate—they will just check that you have followed instructions).
2. Read this article: Tips on How to Conduct a Conference Call
3. Decide which technology you will use for the call (Google Hangouts, Skype, Free Conference Calling.com, Free Conference USA.com, etc.)
4. Create a meeting plan as a Google document. Name it "Group #: Action Items", and share it with your instructor.
5. Choose one person to be the facilitator (or decide which group member will facilitate different phases of the call).

After your call you will individually:

1. Turn in your Communication Services Research on the two free online communication services you proposed to the group on the "call."
2. Turn in a short reflection essay (300 words minimum) on your experience. Use the following questions as prompts:
   - Describe which type of conference tool the group used and the quality of tool. Would you use it again? Why or why not?
   - What was successful or unsuccessful about the call?
   - Were all of the action items addressed? If not why? If they were all addressed, did you have enough to talk about?

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Schedule and conduct an online meeting	**0 pts** Meeting does not occur	**0 pts** Meeting does not occur	**5 pts** Meeting is scheduled but does not occur	**10 pts** Meeting occurs with all members in attendance	10 pts
Create a meeting plan	**0 pts** Plan is not created	**0 pts** Plan is not created	**5 pts** Plan is created but does not include the designation of a call facilitator	**10 pts** Plan is created and lays out the flow of the meeting, as well as designating the facilitator	10 pts
Turn in research on communication services	**0 pts** No research is submitted	**5 pts** Research only discusses one service	**10 pts** Research covers two services, but does not compare the services against one another	**15 pts** Research covers two services and compares their pros and cons	15 pts

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Turn in short reflection essay	**0 pts** No essay is submitted	**5 pts** Essay does not meet word requirement	**10 pts** Essay meets word requirements but does not answer any of the prompt questions	**15 pts** Essay meets word requirements and effectively discusses the success or failure of the call	15 pts
				Total:	**50 pts**

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3.3.25: Audio Communication

Learning Objectives

- Compare and contrast common tools for 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

Figure 1. A Conference Call Phone

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.

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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3.3.26: Video Communication

Learning Objectives

- Compare and contrast common tools for 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.

Figure 1. Example of an ooVoo call.

Each offers slightly different features or different ways of accessing common features. That said, when you are choosing a platform, consider the following parameters:

- 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 1 shows a collaborative meeting with all of the participants' images the same size. Figure 2 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 2. Video conferencing with a lead.

Practice Question

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3.3.27: Online Communication

Learning Objectives

- Compare and contrast common tools for screen / web sharing
- Explore multifeature online platforms / virtual office spaces

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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3.3.28: Comparing Communication Tools

Learning Objectives

- Recognize the strengths and weaknesses of various tool categories

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?"

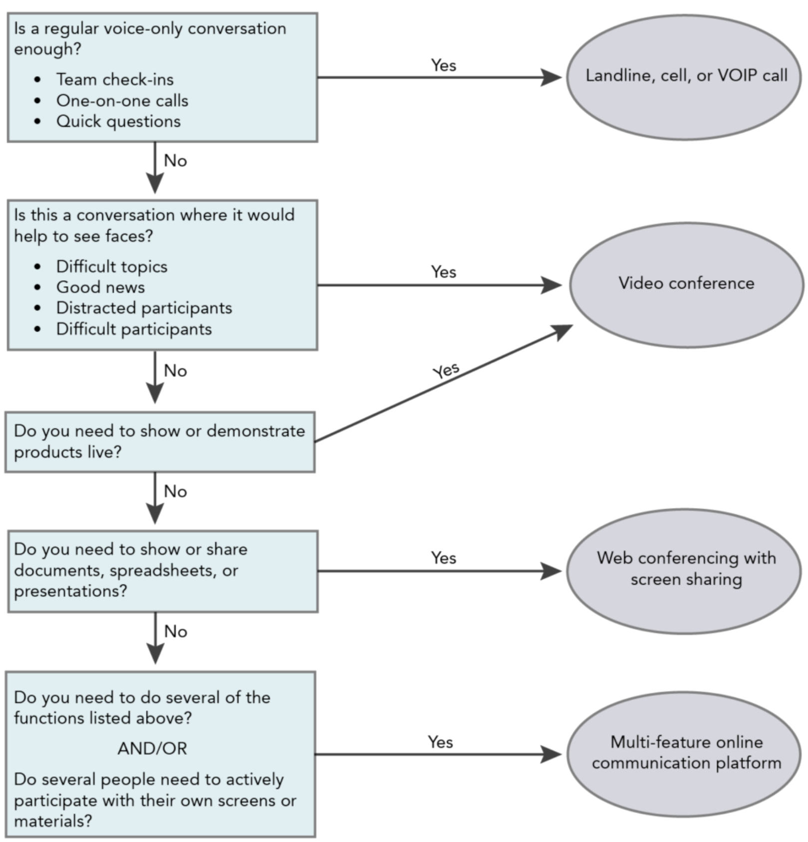

Figure 1. Click for a larger version of this image.

We will talk in more detail about each of these issues in the sections to follow.

Practice Question

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3.3.29: Introduction to 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.

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3.3.30: Polling Tools

Learning Objectives

- Discuss when and how to use 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.

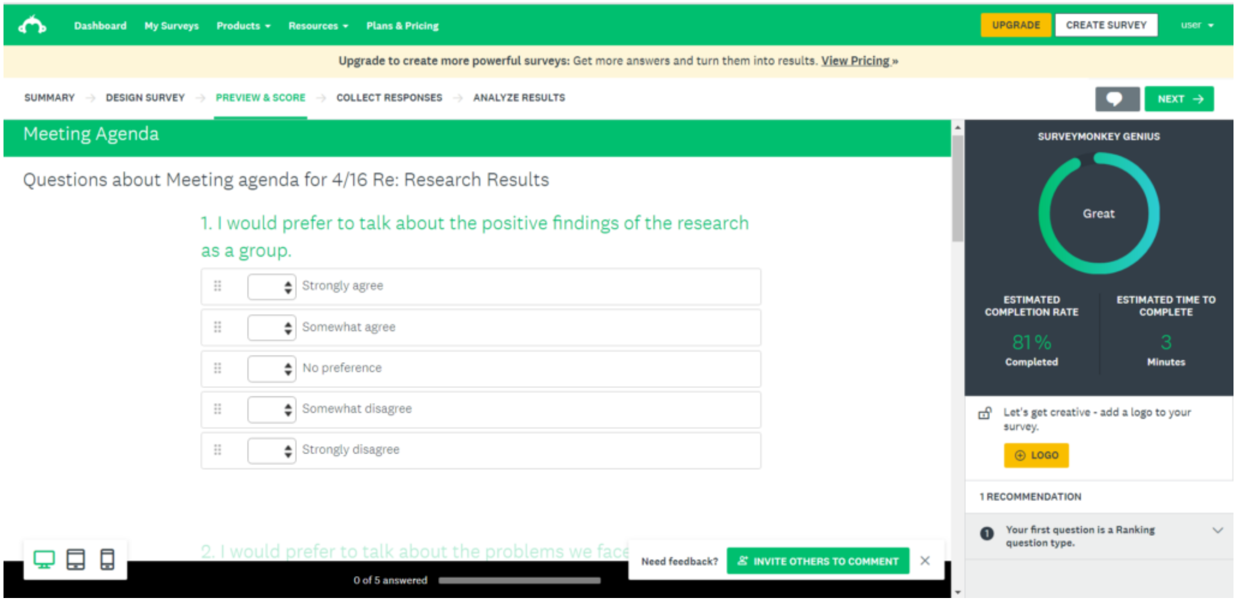
Shawn decides to send his own summary of the report to the store managers prior to a conference call, specifying the problems but not which stores have them, and asking managers to brainstorm on solutions in advance. Then he starts to plan his meeting agenda. He can envision this meeting playing out 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?

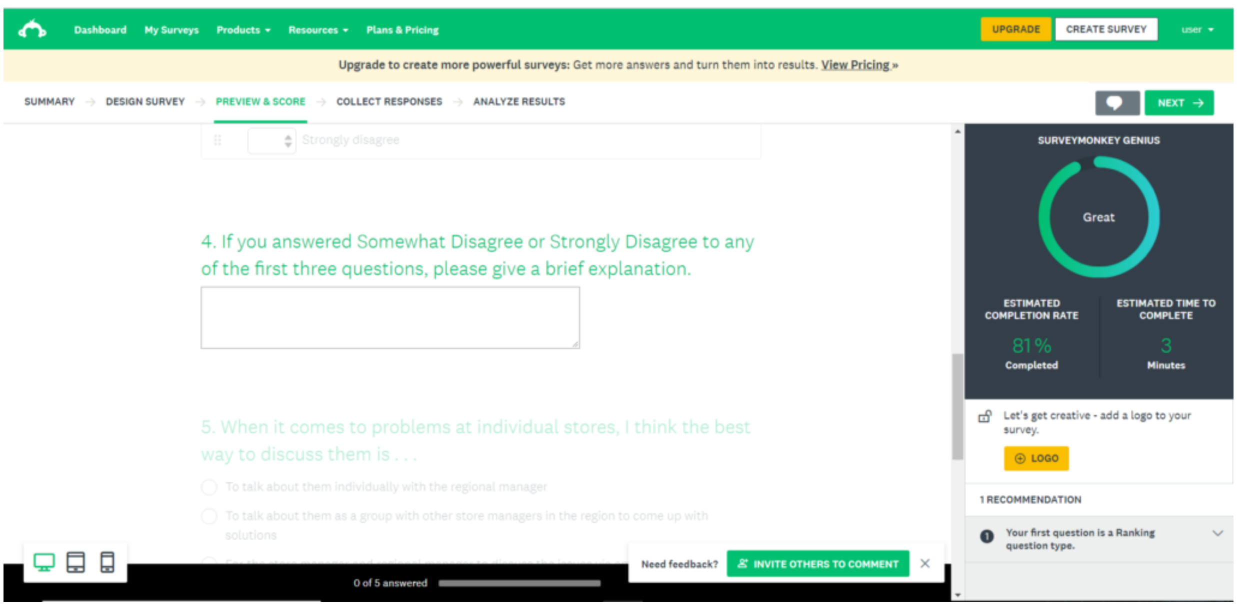
Since all the managers have his summary, he decides to give them a say in how the meeting is run. He creates an account in SurveyMonkey, and he goes through the steps of making a survey.

The basic rules of survey creation are pretty simple at this level, and the software makes it easy.

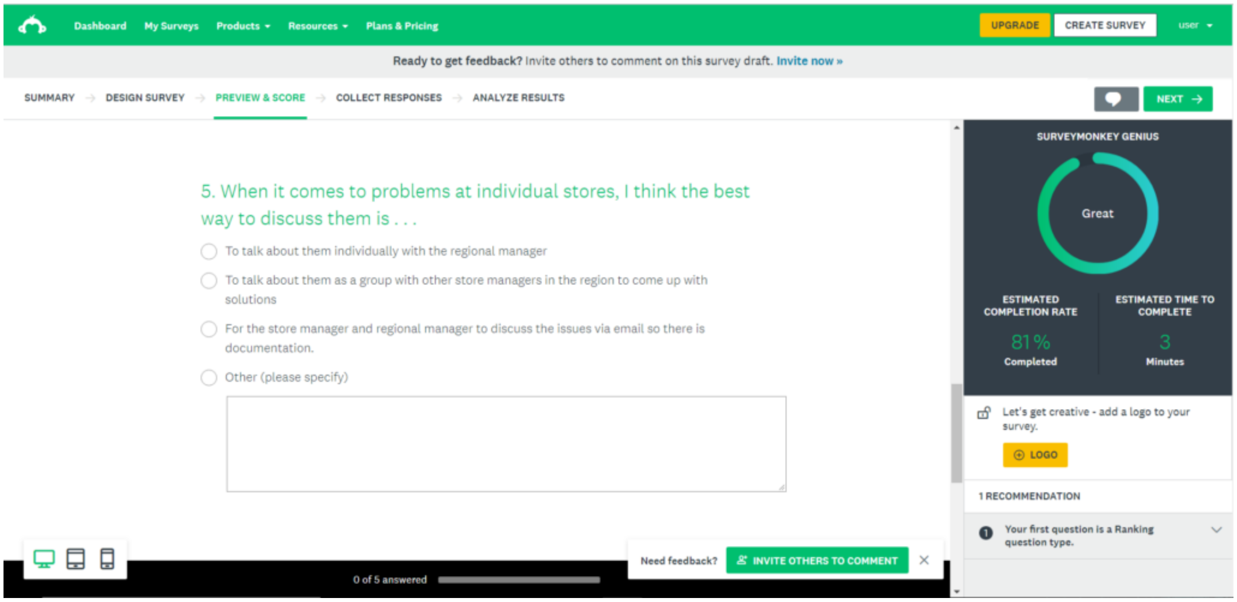
- Ask as few questions as possible while still getting the needed information.
- Ask only questions that related to the issue at hand. Don't ask questions just because you're curious or want to provoke your respondents.
- Phrase questions in a way that gives a full range of options and doesn't "beg the 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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3.3.31: Scheduling Tools

Learning Objectives

- Discuss when and how to use 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

https://assessments.lumenlearning.co...sessments/8632

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SECTION OVERVIEW

3.4: Social Media

3.4.1: Snapchat

Learning Objectives

Describe the primary use of 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:[1]

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

https://assessments.lumenlearning.co...sessments/8655

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:[2]

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 1 in mind:

Table 1. 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

Table 1. Pros and Cons of Snapchat as a Social Media Platform	
Pros	Cons
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.)

1. 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. ↵
2. Parker, Sydney. "Snapchat for Business: A Guide for Marketers." *Hootsuite*. 11 Oct 2017. Web. 10 July 2018. ↵

Contributors and Attributions

3.4.2: Google Plus

Learning Outcomes

Describe the primary use of 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.

When assessing the usefulness of Google Plus, you should keep the pros and cons listed in Table 1 in mind:

Table 1. 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
Created local search engine optimization (SEO)	More manual work to integrate with other social media platforms (minus YouTube)

Practice Question

https://assessments.lumenlearning.co...sessments/8656

3.4.3: Introduction to 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).

3.4.4: Product Launch

Learning Outcomes

Use social media to announce a 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:[1]

- **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.

Table 1. Comparing Social Media Platforms

Platform	Niche?	Mass messaging off-putting?	Other considerations?
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

https://assessments.lumenlearning.co...sessments/8657

1. Jose, Maria. "10 tactics for launching on social media and generating buzz, inspired by companies who've done it." *Canva*. Web. 15 July 2018. ↵

3.4.5: Spotlight Products

Learning Outcomes

Use social media to 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 (@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 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/PFvjwfRl0Wpic.twitter.com/upBY46TEI9

— Netflix (@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

https://assessments.lumenlearning.co...sessments/8658

3.4.6: Sales and Events

Learning Outcomes

Use social media to announce a sale or event

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/6NgxQit5SJpic.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.[1]

PRactice Question

https://assessments.lumenlearning.co...sessments/8659

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

Visit Pinterest's tutorial for building "product pins." The process is relatively simple, and it's worthwhile to emphasize the ease of Pinterest's platform. From their website:[2]

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:[3]

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:[4]

[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.

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1. Kavilanz, Parjia. "Patagonia's Black Friday sales hit $10 million -- and will donate it all." *CNN Tech*. 29 Nov 2016. Web. 10 July 218. ↵
2. "Shop the Look: Product Tagging." Pinterest Help Center. Accessed 9 October 2019. ↵
3. Malone, Matt. "What Are Social Buy Buttons?" *Gravitate Design*. 10 Apr 2017. Web. 10 July 2018. ↵
4. Bell, Karissa. "Snapchat just proved why lenses are a bigger deal than Stories." *Mashable*. 18 Apr 2018. Web. 10 July 2018. ↵

3.4.7: Introduction to 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).

Contributors and Attributions

3.4.8: Cultivate Community

Learning Outcomes

Use social media to 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

https://assessments.lumenlearning.co...sessments/8660

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."[1]

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).

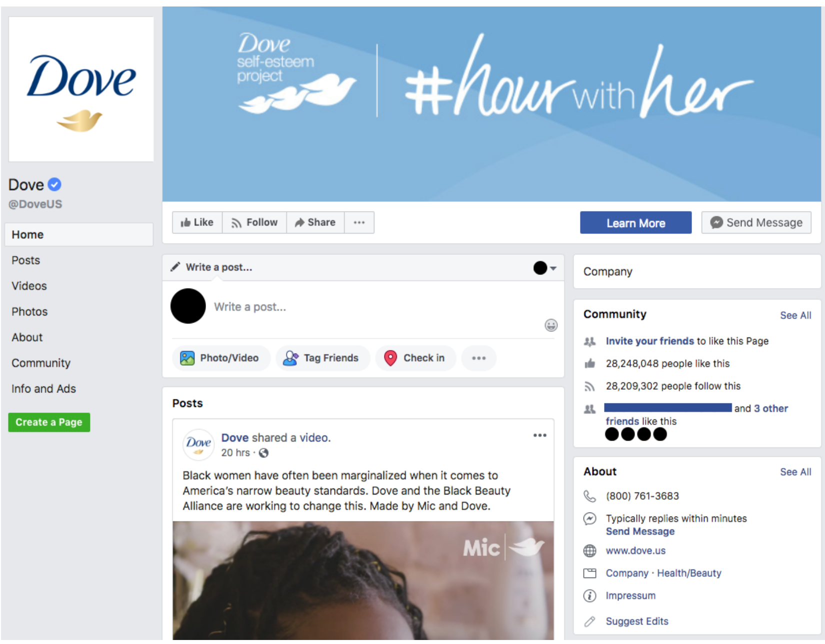

Figure 1. Dove's Hour with Her campaign is highlighted across all of Dove's social media, building their community of women.

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

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1. https://twitter.com/Dove ↵

3.4.9: Create a Sense of Affinity

Learning Outcomes

Use social media to 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.

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

https://assessments.lumenlearning.co...sessments/8661

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." Read more about the say-do gap in the article "Leadership 101: Narrow Your 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 Starbucks' Social Impact page, 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/aOWJKErx35pic.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.

3.4.10: Company News

Learning Outcomes

Use social media to announce 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's article "Organizational Success Starts with an Integrated Customer Experience" for *Forbes*, 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

https://assessments.lumenlearning.co...sessments/8662

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:

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=490

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=490

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?

3.4.11: 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[1]—to make meaningful decisions?

The following video explores the importance of social media in business communications.

A link to an interactive elements can be found at the bottom of this page.

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.

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1. **internal customer:** another member of your own organization, especially a non-executive or non-manager ↵

Contributors and Attributions

3.4.12: 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 RTOWN’s website, RTOWN’S Facebook page and other RTOWN media.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=492

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3.4.13: Assignment- Social Media

Social media has been a game changer for brand awareness building, customer relations, and customer satisfaction. Shoppers are increasingly turning to social media for help with buying decisions. With this shift in advertising, consumers are paving a new purchase path for retailers to follow. Many businesses adopt social media as a promotional mechanism and use social media solely as if it were a traditional one-way advertisement instead of a two-way communication channel.

Here is a short list of common types social media business messages that create customer activity:

- Promotions and discounts
- Latest product information
- Customer support
- Entertaining content
- Ability for customers to offer feedback

For this assignment, you will write 500 words describing your business message by explaining which social media channel is ideal for your company. This assignment has two parts.

Part 1

Create your business message by deciding on one goal. Do you want to increase sales? Or do you want to build affinity with your customers? As you brainstorm, you may want to use the bullet points above and any content from this module to decide on the type of business message you want to share.

Part 2

Choose a social media platform that best fits your message. For this assignment, you can use any social media channel presented in this module. Explain and analyze why this social media channel is the right one for your message. You may compare and contrast why this channel works and why the other options are not ideal. Explain how you will measure whether the message was successful. In your conclusion, describe how a successful business message presented on social media can impact customer loyalty, ensure customer retention, and expand publicity. Make sure you cite any sources.

Optional Assignment Resources:

Do you need more information to help you with this assignment? Check out these links for more information:

- The Modern Guide to Social Media for Retail
- Social media marketing: a guide for business
- 5 Lessons from The Top Retail Brands on Social Media
- How Three Leading Retailers Created Successful Social Media Marketing Strategies

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**2 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**3 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**4 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**5 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer’s conclusion and the format and information could be used independently.	**5 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Content	**2 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**3 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**4 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts**
Development – Critical Thinking	**4 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**6 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**8 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**10 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**10 pts**
Grammar, Mechanics, Style	**2 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**3 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**4 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**5 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**5 pts**
				Total:	**25 pts**

3.4.14: Introduction to 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.[1]

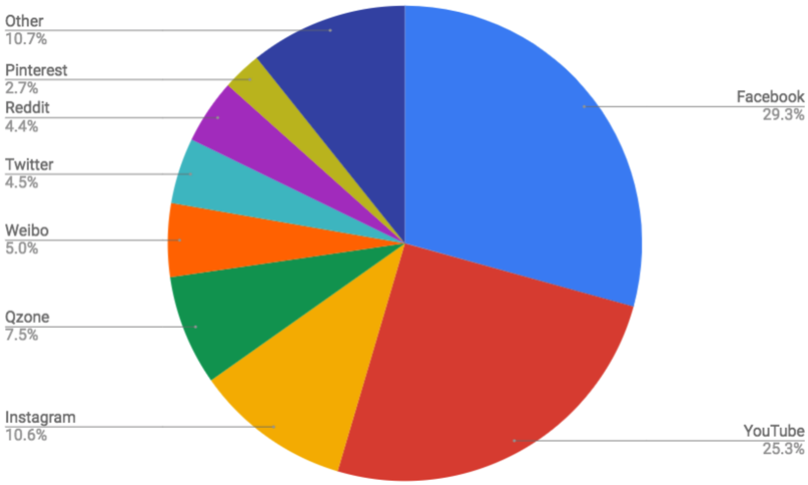

Figure 1. Monthly Active Users on Common Social Media Sites

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:[2]

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.

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1. Kallas, Priit. "Top 15 Most Popular Social Networking Sites and Apps [July 2018]." *Dreamgrow*. July 3 2018. Web. July 10 2018. ↵
2. Fiegerman, Seth. "Twitter is now losing users in the U.S." *CNN Tech*. July 27 2017. Web. July 10 2018. ↵

3.4.15: Facebook

Learning Outcomes

Describe the primary use of 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.

Figure 1. 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 1). They also encourage engagement with their posts by inviting parents to share photos of themselves with their babies:

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=458

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.

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.

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=458

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, 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

https://assessments.lumenlearning.co...sessments/8649

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 1. Pros and Cons of Facebook as a Social Media Platform

Pros	Cons
Massive audience	Concerns over misuse of data

Table 1. Pros and Cons of Facebook as a Social Media Platform	
Pros	Cons
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

3.4.16: Instagram

Learning Outcomes

Describe the primary use of 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 1 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 1. 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.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=460

Practice Question

https://assessments.lumenlearning.co...sessments/8650

When assessing the usefulness of Instagram, you should keep the pros and cons listed in Table 1 in mind:

Table 1. 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

3.4.17: Twitter

Learning Outcomes

Describe the primary use of 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#BookWithUspic.twitter.com/AjxwaW18Jy

— JetBlue (@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. 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 1 in mind:

Table 1. Pros and Cons of Twitter as a Social Media Platform

Pros	Cons

Table 1. 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

https://assessments.lumenlearning.co...sessments/8651

3.4.18: YouTube

Learning Outcomes

Describe the primary use of 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 1), 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.

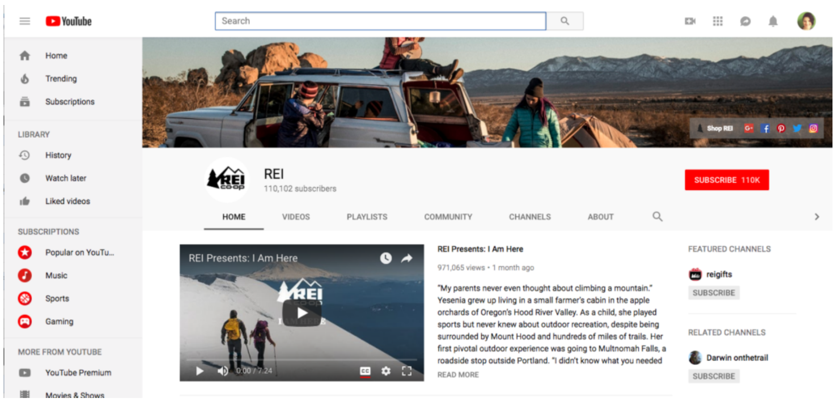

Figure 1. REI's Home on YouTube

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.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=464

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.

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=464

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 1 in mind:

Table 1. 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

https://assessments.lumenlearning.co...sessments/8652

3.4.19: Introduction to 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).

3.4.20: LinkedIn

Learning Outcomes

Describe the primary use of 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[1].

Practice Question

https://assessments.lumenlearning.co...sessments/8653

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).

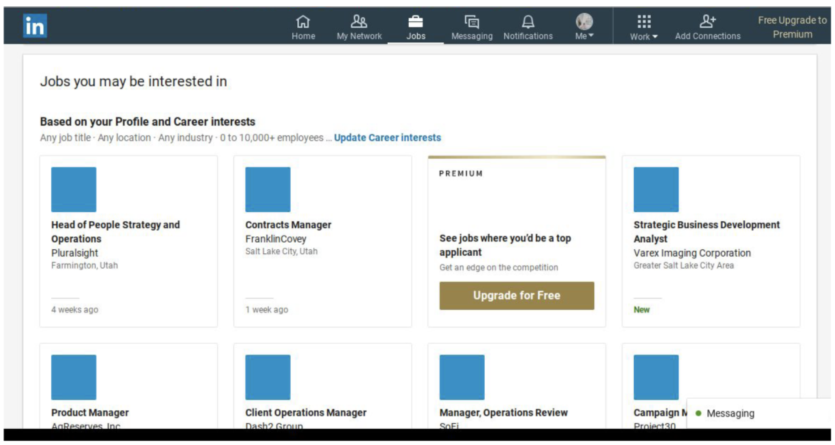

Figure 1. LinkedIn provides “Jobs you may be interested in” based on your profile.

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

1. Aslam, Salman. "Linkedin by the Numbers: Stats, Demographics & Fun Facts." *Omnicore*. 1 Jan 2018. Web. 10 July 2018. ↵

3.4.21: Pinterest

Learning Objectives

Describe the primary use of 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[1]:

- 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.

A link to an interactive elements can be found at the bottom of this page.

When assessing the usefulness of Pinterest, you should keep the pros and cons listed in Table 1 in mind:

Table 1. 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

https://assessments.lumenlearning.co...sessments/8654

1. Aslam, Salman. "Pinterest by the Numbers: Stats, Demographics & Fun Facts." *Omnicore.* 1 Jan 2018. Web. 10 July 2018. ↵

Contributors and Attributions

SECTION OVERVIEW

3.5: Communicating Different Messages

3.5.1: Introduction to 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?

Contributors and Attributions

3.5.2: Types of Criticism

Learning Objectives

- Differentiate between different types of criticism in business.

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.[1]

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

https://assessments.lumenlearning.co...sessments/8669

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1. https://www.merriam-webster.com/dictionary/criticism ↵

Contributors and Attributions

3.5.3: Criticism of Other Businesses

Learning Objectives

- Write an external critical message to a company you are not associated with.

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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3.5.4: Criticism of Customers

Learning Objectives

- Write an external critical message to an existing customer.

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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3.5.5: Criticism of Employees

Learning Objectives

- Write an internal critical message to a person you manage.

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:

A link to an interactive elements can be found at the bottom of this page.

PRACTICE QUESTIONS

https://assessments.lumenlearning.co...sessments/8672

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3.5.6: Criticism of Colleagues

Learning Objectives

- Write an internal critical message to another colleague.

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

https://assessments.lumenlearning.co...sessments/8673

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3.5.7: Introduction to 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.

Contributors and Attributions

3.5.8: How Do You Respond to Criticism?

Learning Objectives

- Discuss key points to a professional response 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.[1]

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

https://assessments.lumenlearning.co...sessments/8674

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.

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1. Jack Griffin, “How To Say It At Work”, 1998. ↵

Contributors and Attributions

3.5.9: Remaining Professional When You’re Frustrated

Learning Objectives

- Discuss ways to remain professional when you are feeling frustrated with others or a situation.

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:

A link to an interactive elements can be found at the bottom of this page.

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.[1]

PRACTICE QUESTIONS

https://assessments.lumenlearning.co...sessments/8675

1. https://www.forbes.com/sites/melodywilding/2016/06/01/5-ways-to-stay-cool-when-work-is-making-you-angry/#3520ef557865 ↵

Contributors and Attributions

3.5.10: Short Responses to Criticism

Learning Objectives

- Write a short message responding to internal or external 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":[1]

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

https://assessments.lumenlearning.co...sessments/8676

1. 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. ↵

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3.5.11: 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.[1]

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.

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1. David Grossman, "The Cost of Poor Communications," The Holmes Report, July 17, 2011. ↵

Contributors and Attributions

3.5.12: Long Responses to Criticism

Learning Objectives

- Write a long message responding to internal or external 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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3.5.13: 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.

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3.5.14: Assignment- Communicating Different Messages

You are a general manager at a grocery store checking your email when you read the two email messages below. Your task is to write a response back to both emails. As you do so, remember the lessons from this module, and seek to address your customers' concerns—you may see the need to ask clarifying questions, but do not outright dismiss their complaints.

Write your responses in a Word document and submit to your course instructor.

Email Complaint #1

Ticket: # 108182 – Unwanted commercial email messages sent to our mobile phones

Date: 8/28/2016 11:16:14 AM

City/State/Zip: Austin, Texas 78704

Hello there,

I'd like to report a violation of my personal privacy. Ever since I signed up for your customer rewards card, I have been receiving hundreds of unwanted commercial email messages per month to my mobile phone. I have tried multiple times to unsubscribe from these email messages. I have clicked on the "Unsubscribe" button dozens of times and confirmed the unsubscribe request was received, but it has not stopped the email messages at all.

I have also tried calling the number on my rewards card and spoken with representatives numerous times, but the company has STILL not complied. I am still bombarded with hundreds of unwanted commercial email messages to my mobile phone. Upon speaking with other customers of yours, it seems like ALL of us are going through the exact same thing with you guys, so it isn't just me who is affected by this spam. I don't how to stop this these emails, and I'm about at my wits end, so I am hopeful that you can help.

Sincerely

Peter Davis

Email Complaint #2

Ticket: # 1523292 – Product Quality

Date: 8/28/2016 2:31:08 PM

City/State/Zip: Austin, Texas 78704

To whom it may concern,

On July 1st, I bought a six pack case of Greek yogurt at your store on SW Main Avenue and 5th Street. Unfortunately, this product not only did not meet any quality requirements, but it also gave me food poisoning.

I am extremely dissatisfied and disappointed with your products because after eating this yogurt, I had a serious allergic reaction. I had to be rushed to the local clinic. Thank goodness I did not allow my children to eat this product—I can only imagine what it could have done to them. Considering that I have had this product multiple times and been fine, but this time when I ate the yogurt I got sick, I am rather sure it is the reason for my allergic reaction. I assume the product had been compromised during shipment to your store or at your store.

I am your long-time and loyal customer. I was always satisfied with the quality of products and services in your store. Therefore, to resolve the problem peacefully, I would appreciate your interest in my problem. I would like to ask you to compensate me with $300, since I had to spend a large sum of money for paying for medicine ($60), clinic visit ($190), and taxi to get there ($40). The rest of the amount ($10) would be a refund for the yogurt. Enclosed are copies of all my receipts.

I hope we can come to a peaceful agreement on this issue. I am waiting for your reply and a resolution to my problem. If I do not hear from you before September 30th, I will seek help from a consumer protection agency or the Better Business Bureau if there is no reply from your side. Please contact me at s.russel@yaja.com or by phone.

Sincerely,

Sheri Russel

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**2 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**3 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**4 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**5 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**5 pts**
Content	**2 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**3 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**4 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts**
Development – Critical Thinking	**4 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**6 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**8 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**10 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**10 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Grammar, Mechanics, Style	**2 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**3 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**4 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**5 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**5 pts**
				Total:	**25 pts**

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3.5.15: Introduction to 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.

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3.5.16: What is an Informative Message?

Learning Objectives

- Discuss the purpose and use cases of informative messages in a business context.

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

https://assessments.lumenlearning.co...sessments/8663

A link to an interactive elements can be found at the bottom of this page.

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3.5.17: Short Informative Messages

Learning Objectives

- Write a short informative message.

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).

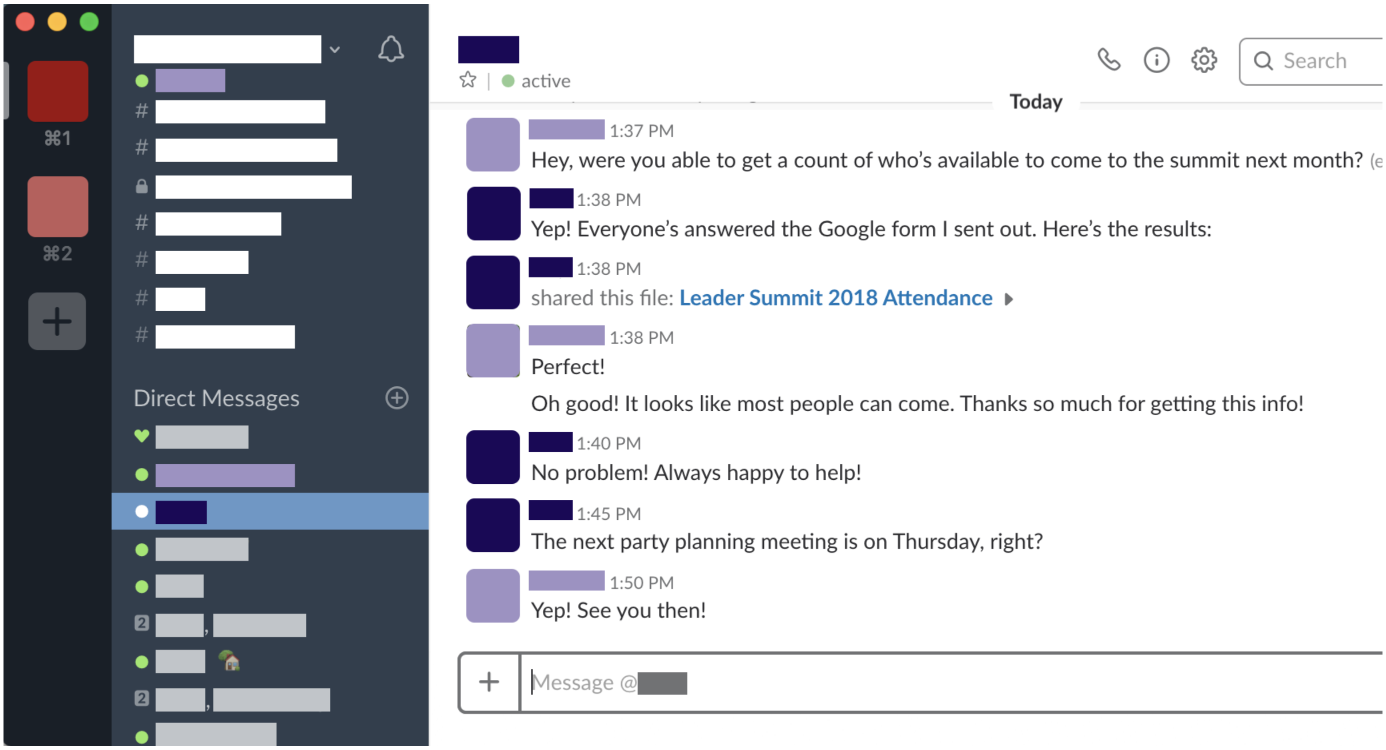

Figure 1. A chat conversation between two coworkers discussing attendance of a future summit.

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

https://assessments.lumenlearning.co...sessments/8664

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3.5.18: Long Informative Messages

Learning Objectives

- Write a long informative message.

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**[1] 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

https://assessments.lumenlearning.co...sessments/8665

1. 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! ↵

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3.5.19: Introduction to 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.

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3.5.20: What is a Team-Focused Message?

Learning Objectives

Discuss the purpose and use cases of team-focused messages in a business context

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:[1]

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

https://assessments.lumenlearning.co...sessments/8666

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."[2]

[1]

We're changing how Starbucks employees collaborate. Over 80% of US store managers use Workplace on a weekly basis. https://www.facebook.com/workplace

Posted by Workplace from Facebook on Wednesday, April 19, 2017

1. The Lean Startup, Eric Ries, 2011www.sandler.com/blog/6-benefits-of-teamwork-in-the-workplace] ↩
2. [https://www.facebook.com/workplace/c...ies/starbucks] ↩

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3.5.21: Short Team-Focused Message

Learning Objectives

- Write a 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.

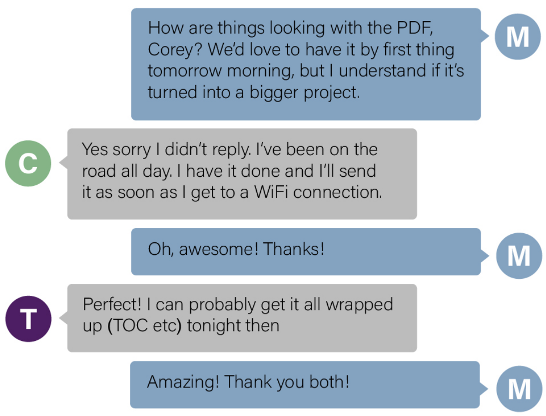

Figure 1. Chat between three collaborating team members

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

https://assessments.lumenlearning.co...sessments/8667

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3.5.22: Long Team-Focused Message

Learning Objectives

- Write a 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.

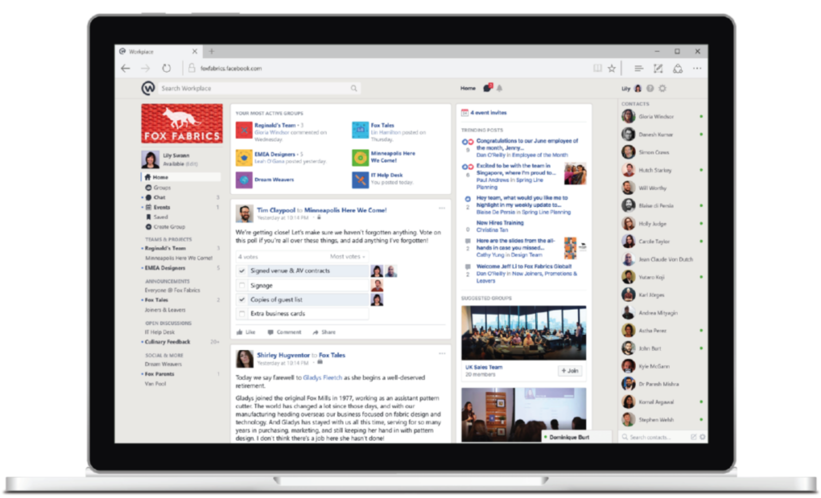

Figure 1. Workplace by Facebook is just one collaboration platform you could use

Practice Question

https://assessments.lumenlearning.co...sessments/8668

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3.6: Gap

CHAPTER OVERVIEW

4: Research, Business Reports, and Business Presentations

SECTION OVERVIEW

4.1: Feedback in the Writing Process

Just as you know that religion and politics are two subjects that often provoke emotional responses, you also recognize that once you are aware of someone's viewpoint you can choose to refrain from discussing certain topics, or may change the way you address them. The awareness of bias and preference, combined with the ability to adapt the message before it is sent, increases the probability of reception and successful communication. Up until now we have focused on knowing the audience's expectation and the assignment directions, as well as effective strategies for writing and production. Now, to complete the communication process, to close the writing process, we need to gather and evaluate feedback.

Thumbnail: pixabay.com/photos/feedback-...t-bad-3677258/

4.1.1: Diverse Forms of Feedback

Learning Objectives

1. Describe feedback as part of the writing process.
2. Compare and contrast indirect and direct feedback.
3. Understand internal and external feedback.
4. Discuss diverse forms of feedback.

You may receive feedback from peers, colleagues, editors, or supervisors, but actual feedback from the intended audience can be rare. Imagine that you work in the marketing department of an engineering company and have written an article describing a new kind of water pump that operates with little maintenance and less energy consumption than previous models. Your company has also developed an advertising campaign introducing this new pump to the market and has added it to their online sales menu. Once your article has been reviewed and posted, it may be accessed online by a reader in another country who is currently researching water pumps that fall within your product range. That reader will see a banner ad displayed across the header of the Web page, with the name of your company prominently displayed in the reader's native language, even if your article is in English. Ads of this nature are called contextually relevant ads. An example is Google's Feedback Ad function, which incorporates the content of the site and any related search data to provide information to potential customers. If the reader found your article through the German version of Google, Google.de, the ad will display the Adwords, or text in an advertisement, in German.

As the author, you may never receive direct feedback on your article, but you may receive significant indirect feedback. Google can report the "hits" and links to your Web site, and your company's information technology department can tell you about the hits on your Web site from Germany, where they originated, and whether the visitor initiated a sales order for the pump. If the sale was left incomplete, they will know when the basket or order was abandoned or became inactive in the purchase process. If the sale was successful, your sales department can provide feedback in the form of overall sales as well as information on specific customers. This in turn allows you an opportunity for postsales communication and additional feedback.

The communication process depends on a series of components that are always present. If you remove one or more, the process disintegrates. You need a source and a receiver, even if those roles alternate and blur. You need a message and a channel, or multiples of each in divergent ratios of signal strength and clarity. You also need context and environment, including both the psychological expectations of the interaction as well as the physical aspects present. Interference is also part of any communication process. Because interference—internal or external—is always present, as a skilled business writer, you have learned how to understand and anticipate it so that you can get your message across to your audience.

The final step in the communication process is feedback. It contributes to the transactional relationship in communication, and serves as part of the cycling and recycling of information, content, negotiations, relationships, and meaning between the source and receiver. Because feedback is so valuable to a business writer, you will welcome it and use strategies to overcome any interfering factors that may compromise reception and limit feedback.

Feedback is defined as a receiver's response to a source, and can come in many forms. From the change in the cursor arrow as you pass over a link as a response to the reader's indication, via the mouse, touch screen, or similar input device, as a nonverbal response, to one spoken out loud during the course of a conversation, feedback is always present, even if we fail to capture or attend to the information as it is displayed. Let's examine several diverse types of feedback.

Indirect Feedback

If you have worked in an office you may have heard of the grapevine, and may already be aware that it often carries whines instead of wine. The grapevine is the unofficial, informal communication network within an organization, and is often characterized by rumor, gossip, and innuendo. The grapevine often involves information that is indirect, speculative, and not immediately verifiable. That makes it less than reliable, but understandably attractive and interesting to many.

In the same way, indirect feedback is a response that does not directly come from the receiver or source. The receiver may receive the message, and may become the source of the response, but they may not communicate that response directly to you, the author. Your ability to track who accesses your Web page, what they read, and how long their visit lasts can be a source of feedback that serves to guide your writing. You may also receive comments, e-mails, or information from individuals within your organization about what customers have told them; this is another source of indirect feedback. The fact that the information is not communicated directly may limit its use or reliability, but it does have value. All forms of feedback have some measure of value.

Direct Feedback

You post an article about your company's new water pump and when you come back to it an hour later there are 162 comments. As you scroll through the comments you find that ten potential customers are interested in learning more, while the rest debate the specifications and technical abilities of the pump. This direct response to your writing is another form of feedback.

Direct feedback is a response that comes from the receiver. Direct feedback can be both verbal and nonverbal, and it may involve signs, symbols, words, or sounds that are unclear or difficult to understand. You may send an e-mail to a customer who inquired about your water pump, offering to send a printed brochure and have a local sales representative call to evaluate how suitable your pump would be for the customer's particular application. In order to do so, you will need the customer's mailing address, physical location, and phone number. If the customer replies simply with "Thanks!"—no address, no phone number—how do you interpret this direct feedback? Communication is dynamic and complex, and it is no easy task to understand or predict. One aspect of the process, however, is predictable: feedback is always part of the communication process.

Just as nonverbal gestures do not appear independent of the context in which the communication interaction occurs, and often overlap, recycle, and repeat across the interaction, the ability to identify clear and direct feedback can be a significant challenge. In face-to-face communication, yawns and frequent glances at the clock may serve as a clear signal (direct feedback) for lack of interest, but direct feedback for the writer is often less obvious. It is a rare moment when the article you wrote is read in your presence and direct feedback is immediately available. Often feedback comes to the author long after the article is published.

Internal Feedback

We usually think of feedback as something that can only come from others, but in the case of internal feedback, we can get it from ourselves. Internal feedback is generated by the source in response to the message created by that same source. You, as the author, will be key to the internal feedback process. This may involve reviewing your document before you send it or post it, but it also may involve evaluation from within your organization.

On the surface, it may appear that internal feedback cannot come from anyone other than the author, but that would be inaccurate. If we go back to the communication process and revisit the definitions of source and receiver, we can clearly see how each role is not defined by just one person or personality, but instead within the transactional nature of communication by function. The source creates and the receiver receives. Once the communication interaction is initiated, the roles often alternate, as in the case of an e-mail or text message "conversation" where two people take turns writing.

When you write a document for a target audience—for example, a group of farmers who will use the pumps your company produces to move water from source to crop—you will write with them in mind as the target receiver. Until they receive the message, the review process is internal to your organization, and feedback is from individuals and departments other than the intended receiver.

You may have your company's engineering department confirm the technical specifications of the information you incorporated into the document, or have the sales department confirm a previous customer's address. In each case, you as the author are receiving internal feedback about content you produced, and in some ways, each department is contributing to the message prior to delivery.

Internal feedback starts with you. Your review of what you write is critical. You are the first and last line of responsibility for your writing. As the author, it is your responsibility to insure your content is

- correct,
- clear,
- concise,
- ethical.

When an author considers whether the writing in a document is correct, it is important to interpret correctness broadly. The writing needs to be appropriate for the context of audience's expectations and assignment directions. Some writing may be technically correct, even polished, and still be incorrect for the audience or the assignment. Attention to what you know about your reading audience (e.g., their reading levels and educational background) can help address the degree to which what you have written is correct for its designated audience and purpose.

Correctness also involves accuracy: questions concerning true, false, and somewhere in between. A skilled business writer verifies all sources for accuracy and sleeps well knowing that no critic can say his or her writing is inaccurate. If you allow less than factual information into your writing, you open the door to accusations of false information that could be interpreted as a fraudulent act with legal ramifications. Keep notes on where and when you accessed Web sites, where you found the information you cite or include, and be prepared to back up your statements with a review of your sources.

Writing correctly also includes providing current, up-to-date information. Most business documents place an emphasis on the time-sensitivity of the information. It doesn't make sense to rely on sales figures from two years ago when you can use sales figures from last year. Neither does citing old articles, outdated materials, and sources that may or may not apply to the given discussion. Information that is not current can and does serve useful purposes, but often requires qualification on why it is relevant, with particular attention to a current context.

Business writing also needs to be clear, otherwise it will fail in its purpose to inform or persuade readers. Unclear writing can lead to misunderstandings that consume time and effort to undo. An old saying in military communications is "Whatever *can* be misunderstood, *will* be misunderstood." To give yourself valuable internal feedback about the clarity of your document, try to pretend you know nothing more about the subject than your least informed reader does. Can you follow the information provided? Are your points supported?

In the business environment, time is money, and bloated writing wastes time. The advice from the best-selling style guide by William Strunk Jr. and E. B. White to "omit needless words" is always worth bearing in mind.

Finally, a skilled business writer understands he or she does not stand alone. Ethical consideration of the words you write, what they represent, and their possible consequences are part of the responsibility of a business writer. The writer offers information to a reading audience and if their credibility is lost, future interactions are far less likely to occur. Customer relationship management requires consideration of the context of the interaction, and all communication occurs with the context of community, whether that relationship is readily apparent or not. Brand management reinforces the associations and a relationship with the product or services that would be negatively compromised should the article, and by association, author and company, be found less than truthful. Advertising may promote features, but false advertising can and does lead to litigation. The writer represents a business or organization, but also represents a family and a community. For a family or community to function, there has to be a sense of trust amid the interdependence.

External Feedback

How do you know what you wrote was read and understood? Essentially, how do you know communication interaction has occurred? Writing, reading, and action based on the exchange of symbolic information is a reflection of the communication process. Assessment of the feedback from the receiver is part of a writer's responsibility. Increasingly Web-based documents allow for interaction and enhancement of feedback, but you will still be producing documents that may exist as hard copies. Your documents may travel to places you don't expect and cannot predict. Feedback comes in many forms and in this part of our discussion we focus on answering that essential question, assessing interaction, and gathering information from it. External feedback involves a response from the receiver. Receivers, in turn, become a source of information themselves. Attention to the channel they use (how they communicate feedback), as well as nonverbal aspects like time (when they send it), can serve you on this and future documents.

Hard Copy Documents and External Feedback

We'll start this discussion with traditional, stand-alone hard copy documents in mind before we discuss electronic documents, including Web-based publications. Your business or organization may communicate in written forms across time zones and languages via electronic communication, but some documents are still produced on paper. Offline technologies like a copy machine or a printer are still the tools you will be using as a normal course of business.

Letters are a common way of introducing information to clients and customers, and you may be tasked to produce a document that is printed and distributed via "snail mail," or the traditional post mail services. Snail mail is a term that reflects the time delay associated with the physical production, packaging, and delivery of a document. Legal documents are still largely in hard copy print form. So too are documents that address the needs of customers and clients that do not, or prefer not to, access information electronically.

Age is one characteristic of an audience that may be tempting to focus on when considering who may need to receive a letter in hard copy form, but you may be surprised about this. In a 2009 study of U.S. Internet use, the Pew Research Center (Horrigan,

2009) found that between 2008 and 2009, broadband Internet use by senior citizens increased from 20 percent to 30 percent, and broadband use by baby boomers (people born 1945–1963) increased from 50 percent to 61 percent.

Socioeconomic status is a better characteristic to focus on when considering hard copy documents. Lack of access to a computer and the Internet is a reality for most of the world's population. It's often stated that half of the world's population will never make a phone call in their lifetime, and even though the references for the claims are widespread and diverse, the idea that there are people without access to a phone is striking for many Westerners. While cell phones are increasingly allowing poor and rural populations to skip the investment in landline networks and wireless Internet is a leapfrog technology that changes everything, cell phones and computers are still prohibitively expensive for many.

Figure 4.1.1.1: In an increasingly interconnected world, feedback is important to business success. Jurgen Appelo – FIGURE 11.2 – CC BY 2.0.

Let's say you work for a major bank on the West Coast of the United States. You have been assigned to write a letter offering a refinance option to a select, previously screened audience composed of individuals who share several common characteristics: high-wage earners with exceptional credit scores. How will you best get the attention of this audience? If you sent an e-mail it might get deleted as spam, or unwanted e-mail that often lacks credibility and may even be dangerous. The audience is small and you have a budget for hard copy production of documents that includes a line item for mailing costs. If the potential customer receives the letter from your department delivered by an overnight courier like FedEx, they may be more likely to receive your message.

In 2005, Wells Fargo Bank did exactly that. They mailed a letter of introduction outlining an opportunity to refinance at no cost to the consumer, targeting a group identified as high profit and low risk. The channels selected—print-based documents on letterhead with the mode of delivery sure to get attention—were designed to prompt a response. The letter introduced the program, highlighted the features, and discussed why the customers were among a group of individuals to whom this offer was being extended (Diaz, 2005).

In the letter, the bank specifically solicited a customer response, a form of feedback, via e-mail and/or phone to establish dialogue. One could measure feedback in terms of response rate; in terms of verification of data on income, debt outstanding on loans, and current home appraisal values; and in terms of channel and how customers chose to respond. All these forms of feedback have value to the author.

Hard copy documents can be a challenge when it comes to feedback, but that doesn't mean it is impossible to involve them in the feedback process. It's important to remember that even in the late 1990s, most business documents were print-based. From sales reports to product development reports, they were printed, copied, bound, and distributed, all at considerable cost.

If one purpose of your letter is to persuade the client or customer to reply by e-mail or phone, one way to assess feedback is the response rate, or the number of replies in relation to the number of letters sent. If your report on a new product is prepared for internal use and is targeted to a specific division within your company, their questions in relation to the document may serve as feedback. If your memo produces more questions than the one it was intended to address in terms of policy, the negative feedback may highlight the need for revision. In each case, hard copy documents are often assessed through oral and written feedback.

External Feedback in a Virtual Environment

Rather than focus on the dust on top of documents once produced, perhaps read, and sometimes forgotten, let's examine document feedback from the interactive world that gathers no dust. One challenge when the Web was young involved the accurate assessment of audience. Why is that relevant to a business writer? Because you produce content for a specific audience with a specific purpose, and the degree to which it is successful has some relation to its value. Imagine that you produced a pilot television program with all the best characters, excellent dialogue, and big name stars portraying the characters, only to see the pilot flop. If you had all the right elements in a program, how could it fail? It failed to attract an audience. Television often uses ratings, or measurements of the estimated number of viewers, to measure success. Nielsen is the leading market research company associated with television ratings and online content. Programs that get past a pilot or past a first season do so because they have good ratings and are ranked above other competing programs. All programs compete with each other within a time slot or across a genre. Those that are highly ranked—those that receive the largest number of viewers—can command higher budgets, and often receive more advertising dollars. Those programs that reach few people are often canceled and replaced with other programs that have great characters, solid writing, and hopeful stars as the cycle continues.

Business writers experience a process of competition, ratings, feedback, and renewal within the world of online publishing. Business writers want their content to be read. Just as companies developed ways to measure the number of viewers of a given television program, which led to rankings that influenced which programs survived and prospered and which were canceled, the Web has a system of keeping track of what gets read and by whom. Perhaps you've heard of hits, as in how many hits a Web site receives, but have you stopped to consider what hits represent within our discussion of feedback?

First, let's examine what a hit is. When a browser, like Internet Explorer or Firefox, receives a file from a Web server, it is considered a hit. Your document may be kept on our company's Web server, or a computer dedicated to serving the online requests for information via the Internet. The Web server receives a request from the user and sends the files associated with the page; every Web page contains several files including graphics, images, and text. Each file request and receipt between server and browser counts as a hit, regardless of how many files each page contains. So let's say you created an online sales catalog with twenty images per page, twenty boxed text descriptions, and all the files for indicating color, size, and quantity. Your document could have quite a few hits with just one page request and only one viewer.

Does a large number of hits on your document mean that it was successful? Not necessarily. Hits or page views have largely been discredited as a reliable measure of a document's effectiveness, popularity, or audience size. In fact, the word "hits" is sometimes humorously referred to as being the acronym for *how idiots track success*.

Page views are a count of how many times a Web page is viewed, irrespective of the number of files it contains. Each time a user or reader views the page counts as one page view.

Nielsen Online and Source.com are two companies that provide Web traffic rating services, and Google has also developed services to better enable advertisers to target specific audiences[1]. They commonly track the number of unique visits a reader makes to a Web site, and use cookies, or small, time-encoded files that identify specific users, as a means to generate data.

Another way to see whether a document has been read online is to present part of the article with a "reveal full article" button after a couple of paragraphs. If someone wants to read the entire article, the button needs to be clicked in order to display the remainder of the content. Because this feature can be annoying for readers, many content providers also display a "turn off reveal full article" button to provide an alternative; Yahoo! News is an example of a site that gives readers this option.

Jon Kleinberg's HITS (hyperlink-induced topic search) algorithm has become a popular and more effective way to rate Web pages (Kleinberg, 1998). HITS ranks documents by the links within the document, presuming that a good document is one that incorporates and references, providing links to, other Web documents while also being frequently cited by other documents. Hubs, or documents with many links, are related to authority pages, or frequently cited documents. This relationship of hubs and authority is mutually reinforcing, and if you can imagine a Web universe of one hundred pages, the one with the most links and which is most frequently referred to wins.

As a business writer you will naturally want to incorporate authoritative sources and relevant content, but you will also want to attract and engage your audience, positioning your document as hub and authority within that universe. Feedback in the form of links and references may be one way to assess your online document.

User-Generated Feedback

Moving beyond the Web tracking aspects of feedback measurement in terms of use, let's examine user-generated responses to your document. Let's say you have reviewed the posts left by unique users to the comments section of the article. This, in some ways, serves the same purpose as letters to the editor in traditional media. In newspapers, magazines, and other offline forms of print media, an edition is produced with a collection of content and then delivered to an audience. The audience includes members of a subscriber-based group with common interests, as well as those who read a magazine casually while waiting in the doctor's office. If an article generated interest, enjoyment, or outrage (or demanded correction), people would write letters in response to the content. Select responses would be published in the next edition. There is a time delay associated with this system that reflects the preparation, production, and distribution cycle of the medium. If the magazine is published once a month, it takes a full month for user feedback to be presented in print—for example, letters commenting on an article in the March issue would appear in the "Letters" section of the May issue.

With the introduction of online media, the speed of this feedback loop has been greatly increased. Public relations announcements, product reviews, and performance data of your organization are often made available internally or externally via electronic communication. If you see a factual error in an article released internally, within minutes you may be able to respond with an e-mail and a file attachment with a document that corrects the data. In the same way, if the document is released externally, you can expect that feedback from outside your organization will be quick. Audience members may debate your description of the water pump, or openly question its effectiveness in relation to its specifications; they may even post positive comments. Customer comments, like letters to the editor, can be a valuable source of feedback.

Customer reviews and similar forms of user-generated content are increasingly common across the Internet. Written communication is often chosen as the preferred format; from tweets to blogs and commentary pages, to threaded, theme-based forums, person-to-person exchange is increasingly common. Still, as a business writer, you will note that even with the explosion of opinion content, the tendency for online writers to cite a Web page with a link can and does promote interaction.

It may sound strange to ask this question, but is all communication interaction good? Let's examine examples of interaction and feedback and see if we can arrive at an answer.

You may have heard that one angry customer can influence several future customers, but negative customer reviews in the online information age can make a disproportionate impact in a relatively short time. While the online environment can be both fast and effective in terms of distribution and immediate feedback, it can also be quite ineffective, depending on the context. "Putting ads in front of Facebook users is like hanging out at a party and interrupting conversations to hawk merchandise," according to Newsweek journalist Daniel Lyons. Relationships between users, sometimes called social graphs, are a reflection of the dynamic process of communication, and they hold value, but translating that value into sales can be a significant challenge.

Overall, as we have seen, your goal as a business writer is to meet the audience and employer's expectations in a clear and concise way. Getting your content to a hub position, and including authoritative references, is a great way to make your content more relevant to your readers. Trying to facilitate endless discussions may be engaging and generate feedback, but may not translate into success. Facebook serves as a reminder that you want to provide solid content and attend to the feedback. People who use Google already have something in mind when they perform a search, and if your content provides what readers are looking for, you may see your page views and effectiveness increase.

Interviews

Interviews provide an author with the opportunity to ask questions of, and receive responses from, audience members. Since interviews take considerable time and cannot easily be scaled up to address large numbers of readers, they are most often conducted with a small, limited audience. An interview involves an interviewer, and interviewee, and a series of questions. It can be an employment interview, or an informational interview in preparation of document production, but in this case we're looking for feedback. As a business writer, you may choose to schedule time with a supervisor to ask a couple of questions about how the document you produced could be improved. You may also schedule time with the client or potential customer and try to learn more. You may interact across a wide range of channels, from face-to-face to an e-mail exchange, and learn more about how your document was received. Take care not to interrupt the interviewee, even if there is a long pause, as some of the best information comes up when people feel the need to fill the silence. Be patient and understanding, and thank them for taking the time to participate in the interview. Relationships are built over time and the relationship you build through a customer interview, for example, may have a positive impact on your next writing project.

Surveys

At some point, you may have answered your phone to find a stranger on the other end asking you to take part in a survey for a polling organization like Gallup, Pew, or Roper. You may have also received a consumer survey in the mail, with a paper form to fill out and return in a postage-paid envelope. Online surveys are also becoming increasingly popular. For example, SurveyMonkey.com is an online survey tool that allows people to respond to a set of questions and provide responses. This type of reader feedback can be valuable, particularly if some of the questions are open-ended. Closed questions require a simple yes or no to respond, making them easier to tabulate as "votes," but open-ended questions give respondents complete freedom to write their thoughts. As such, they promote the expression of new and creative ideas and can lead to valuable insights for you, the writer.

Surveys can take place in person, as we discussed in an interview format, and this format is common when taking a census. For example, the U.S. government employs people for a short time to go door to door for a census count of everyone. Your organization may lack comparable resources and may choose to mail out surveys on paper with postage-paid response envelopes or may reduce the cost and increase speed by asking respondents to complete the survey online.

Focus Groups

Focus groups involve a representative sample of individuals, brought together to represent a larger group or audience. If you know your target audience, and the range of characteristics they represent, you would look for participants who can represent more than one of those characteristics. As we've discussed in an interview setting, the interaction involves a question-and-answer format, but may also introduce other ways to facilitate interaction. If your company is looking to launch a new product, you may introduce that product to this select audience to see how they react. As a business writer, what they say and express may help you in writing your promotional materials. In terms of feedback, you may assemble a group of individuals who use your product or service, and then ask them a series of questions in a group setting. The responses may have bearing on your current and future documents.

Figure 4.1.1.2: Focus groups can be an important source of feedback. Susan Sermoneta – small group work at FIT – CC BY-NC-ND 2.0.

Normally we'd think of focus groups in a physical setting, but again modern technology has allowed for innovative adaptations. Forums, live Webcasts, and other virtual gatherings allow groups to come together across time and distance to discuss specific topics. A Web camera, a microphone, and an Internet connection are all it takes. There are a number of software programs and online platforms for bringing individuals together. Anticipate that focus groups will increasingly gather via computer-mediated technologies in the future as the costs of bringing people together for a traditional meeting increase.

Key Takeaway

Feedback may be indirect or direct, internal or external, and may be mediated electronically in many different ways.

Exercises

1. Design a market survey that asks your friends at least three questions that have to do with their attitudes, preferences, or choices. Prepare and present your results, noting the number of respondents, and any characteristics that you requested or can offer, like age or level of education, for example.
2. How does the online world affect the process of feedback on written documents? Does it improve feedback, or lead to self-censorship? Discuss your thoughts with classmates.
3. In your opinion, are traditional print publications still viable with daily, weekly, or monthly publication cycles? Why or why not?
4. Research online survey programs and review two competitors. Compare the features and the apparent ease of use. Which would you recommend and why? Report your results and compare with classmates.

[1] http://googleblog.blogspot.com/2012/01/search-plus-your-world.html (06/28/12).

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4.1.2: Qualitative and Quantitative Research

Learning Objectives

- Compare and contrast the feedback that can be obtained with qualitative and quantitative research.
- Discuss validity, reliability, and statistical significance.

Perhaps you have heard the term “market research” or have taken a class on statistics. Whether your understanding of the gathering of credible, reliable information is emerging or developed, a general awareness of research is essential for business writing. Many businesses use research as a preproduct, postproduct, and service development method of obtaining feedback. Understanding the feedback from research can influence your writing as you learn more about your target audience. Ralph Rosnow and Robert Rosenthal offer a solid introductory discussion into basic research terms in their text *Beginning Behavioral Research: A Conceptual Primer* that serves our discussion well (Rosnow, 1999).

We can divide research into two basic categories:

1. *Qualitative research* focuses on *quality* in the sense of “what is it like?” or “how does it feel?”
2. *Quantitative research* focuses on *quantity* in the sense of “how many customers?” or “what percentage?”

Let’s examine the advantages and disadvantages of each of these kinds of research.

Obtaining Feedback with Qualitative Research

Qualitative research involves investigative methods that cross subjects and academic disciplines to gain in-depth information. If quantitive research explores “what,” qualitative research explores “how” and “why.” From interviews to focus groups, many of the face-to-face strategies used to gather information are qualitative in nature.

You have five senses, and you may be able to distinguish between sweet and salty foods, but can you describe what you taste and smell? Let’s say you work for a vineyard, and have been tasked to write a paragraph describing a new wine. Could you? Capturing fine data points and representing them in words and symbols can be a significant challenge for researchers. When testing the wine with a focus group, you might want information on how it is perceived, and the responses may be varied and unusual. What do you do with the information you gather? You may be able to identify trends among the varied responses, and create groups that indicate a woody or earthy flavor, but numbers will fail to capture the nuances of flavor and body of the wines in the information.

Some information—like the way consumers characterize the taste of a wine—is a challenge to obtain, and qualitative research often serves well in this capacity. If quantitative research handles large audiences well, qualitative research allows for in-depth interpersonal interviews that produce rich and meaningful results. The information may not be as reliable, and your ability to produce the same results over time may be limited, but humans are emotional, irrational, and unpredictable. They are also, each in his or her own way, unique. As you increase the level of perspective in terms of abstraction, all humans may eventually come to look similar, even the same. We all possess some similar characteristics, such as the use of language, or the composition of our bodies. But when you look more closely, you see the diverse range of languages, and learn that not everyone has 206 bones in an adult body. Between these two views we find the range of information that quantitative and qualitative research attempt to address.

Suppose we want to determine who has greater lifetime risk of developing heart disease, a man or a woman? If we are talking about an individual man and an individual woman, our answer might be quite different from what it would be if we were talking about men in general versus women in general. A survey may work well to capture the data about men versus women, but a face-to-face interview with a man and a woman will allow for interaction, follow-up questions, and a much better picture of the question: between this individual woman and this individual man, who is more likely to be at risk? The risk and protective factors we learn from broad research projects involving thousands of subjects have value, but there are times when a broad brushstroke will fail to capture the fine data that is needed or desired.

Imagine that you are involved with a direct observation of buying behavior by reviewing video recordings of security cameras that clearly show your company’s product in relation to other products on the shelf. You may find, particularly after a review of the literature, that product placement makes a significant impact on purchase decisions. In addition, you may be involved with some level of participation in the setting. Serving as a participant observer means you are part of the process, involved in action, and not separated from the interaction. You look at the sales experience through the eyes of a participant, and view others through the eyes of an observer. You may find that interviews and focus groups serve to teach you more about your audience, but may also find that others have conducted similar interviews and learn from their findings.

As a business writer, you should be familiar with qualitative research and its relative strengths and weaknesses. You may use some of its techniques to gather information about your audience, may cite research that involves qualitative methods, and may utilize its strategies with an audience post document, product, or service.

Obtaining Feedback with Quantitative Research

Quantitative research involves investigation and analysis of data and relationships between data that can be represented by numbers. It is often used to test a hypothesis, and normally involves large volumes of data. Where a qualitative research project may involve a dozen interviews, a quantitative one would involve hundreds or thousands. Since each interview carries a cost—and a thousand or ten thousand interviews may exceed the research budget of your organization—a more cost-effective alternative must be found. By limiting the number of questions and limiting the ways in which participants can respond, the data can be gathered at a lower cost with often a higher level of statistical validity.

In qualitative research, you may ask an open-ended question like "What does the wine taste like?" In quantitative research, you may limit the response options: "Does the wine taste (a) woody, (b) fruity, or (c) both?" You may find that 90 percent of respondents indicate answer (c); you can represent it with numbers and a graph, but it may not serve your investigation the way you planned.

Research methodologies involve examining and evaluating the methods used in investigation or soliciting feedback. They are used to address and improve poorly worded questions, and to help the investigator match the research goal to the method. Quantitative research serves us well when we ask, does vitamin C, taken at a dosage of 500 mg daily for five years, lower the incidence of the common cold? We could track a thousand participants in the study who provide intake prescreening information, confirm daily compliance, and participate in periodic interviews. We also know that part of our group is taking a placebo (sugar pill) as part of the requirements of a double-blind study. At the end of the term, we have certain numbers that may be able to indicate the degree to which vitamin C affects the incidence rate of illness.

Figure 4.1.2.1: Audience research is critical to success. Dave – CC BY-NC-ND 2.0.

Advertisers often conduct research to learn more about preference and attitudes, two areas that are not easily captured. Sometimes preference studies use Likert scales, which give respondents a preset scale to rate their answers. An example of a Likert item might be, "Please indicate to what degree you agree or disagree with this statement: I enjoy drinking brand X wine. Do you (1) strongly agree, (2) agree, (3) neither agree nor disagree, (4) disagree, or (5) strongly disagree?"

There is a tendency for some attitudinal and preferential research that may be more accurately described as qualitative, to be described in numerical terms. For example, you have probably heard the claim that "four out of five dentists prefer brand X," when in itself, the number or representation of preference is meaningless. As an astute business writer, you will be able to understand pre (before) and post (after) document, product, or service research investigations and distinguish between the two main approaches.

What Is Validity?

How do you know the results presented in a study or article have value? How do you know they are valid? Validity involves the strength of conclusions, inferences or assertions. Thomas Cook and Dan Campbell indicate that validity is often the best available approximation of the truth or falseness of an inference, proposition, or conclusion. Readers want to know that your information has value and that there is confidence in its points, supporting information, and conclusions. They want to know you are right and not making false statements.

One way you can address the value of validity is to cite all your sources clearly. As a writer, you may certainly include information from authorities in the field when the attribution is relevant and the citation is clear. Giving credit where credit is due is one way to make your information more valuable, and by referencing the sources clearly, you enable the reader to assess the validity of the information you have provided.

Does all feedback have validity? Just as there are many threats to validity in research applications, you cannot always be sure that the feedback you receive is accurate or truthful. Have students ever evaluated professors negatively because of the required work in the course? Of course. In the same way, some readers may have issues with the topic or your organization. Their feedback post may be less than supportive, and even openly hostile. Assess the validity of the feedback, respond with professionalism at all times, and learn how to let go of the negative messages that offer little opportunity to improve understanding.

What Is Reliability?

Reliability is the consistency of your measurements. The degree to which an instrument gives the same measurement each and every time with the same subjects, in the same context, is a measure of its reliability. For example, if you took your temperature three times within fifteen minutes, and your thermometer gave a different reading each time—say, 98.6, 96.6, and 100.2—you would conclude that your thermometer was unreliable.

How does this apply to feedback in business writing? Let's say you have three sales agents who will complete follow-up interactions with three customers after you have sent a report to each customer on their purchases to date with suggestions for additional products and services. All three sales agents have the same information about the products and services, but will they perform the same? Of course not. Each one, even if they are trained to stay on script and follow specific protocols, will not be identical in their approach and delivery. Each customer is also different, so the context is different in each case. As business professionals, we need to learn about our environment and adapt to it. This requires feedback and attention to the information in many forms. We need to assess the degree of strength or weakness of the information, its reliability, or validity, and be prepared to act on that information. Successful businesses, and by extension successful business communicators, recognize that communication is a two-way process in which we need to listen, learn, and respond to feedback. We need to meet and exceed the expectations of our customers.

Inter-rater reliability involves the degree to which each evaluator evaluates the same in similar contexts. One can think of a college essay, for example, to better understand this concept. Let's say you write an essay on customer relationship management and submit it to the instructor of your business communication class. At the same time, you submit the same essay to your English professor, and you submit a copy to your marketing professor. Will all three professors evaluate your essay the same? Of course not. They will each have their own set of expectations and respective disciplines that will influence what they value and how the evaluate. Still, if your essay is thoroughly researched, logically organized, and carefully written, each professor may give it a better than average grade. If this is the case, inter-rater reliability would indicate that you did a good job on the essay.

What Is Statistically Significant?

This is a research term that is often used and commonly misunderstood. Not every research finding is statistically significant, and many of those that are considered significant are only slightly more likely than pure chance. Statistically significant findings are those that have a high level of reliability, in that if the same test is applied in the same context to the same subjects, the results will come out the same time and time again (Stone-Romero, 2002). You may see a confidence level of +/– (plus or minus) three percentage points as a common statement of reliability and confidence in a poll. It means that if the poll were repeated, there is confidence that the results would be within three points above or below the percentages in the original results. When statements of statistical significance are made, you will know that it means a difference or a relationship was established with confidence by the study. That confidence gives the results credibility.

Key Takeaway

Research can be qualitative or quantitative, and it is important to assess the validity, reliability, and statistical significance of research findings.

Exercises

1. Visit the Web site of a major polling organization such as Gallup, Pew, Roper, or Zogby. What can you learn about how the organization conducts polls? How valid, reliable, and statistically significant are the results of this organization's polls, and how do you know? Discuss your findings with your classmates.
2. Find an example where information is presented to support a claim, but you perceive it to be less than valid or reliable. Share your observations and review the results of your classmates' similar efforts.

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4.1.3: Feedback as an Opportunity

Learning Objectives

1. Describe the five types of feedback identified by Carl Rogers.

Writing is a communicative act. It is a reflection of the communication process and represents each of the process's components in many ways. Yet, because many people tend to think of writing as a one-way communication, feedback can be particularly challenging for a writer to assess. The best praise for your work may be the sound of silence, of the document having fulfilled its purpose without error, misinterpretation, or complaint. Your praise may come in the form of increased referrals, or sales leads, or outright sales, but you may not learn of the feedback unless you seek it out. And that is what this section is about: seeking out feedback because it is an opportunity—an opportunity to engage with your audience, stimulate your thinking, and ultimately improve your writing.

You ask a colleague, "How was your weekend?" and he glances at the floor. Did he hear you? Was his nonverbal response to your question one of resignation that the weekend didn't go well, or is he just checking to make sure his shoes are tied? Feedback, like all parts of the communication model, can be complex and puzzling. Do you ask again? Do you leave him alone? It is hard to know what an action means independent of context, and even harder to determine without more information. Feedback often serves the role of additional information, allowing the source to adapt, adjust, modify, delete, omit, or introduce new messages across diverse channels to facilitate communication. One point of reference within the information or response we define as feedback may, in itself, be almost meaningless, but taken together with related information can indicate a highly complex response, and even be used to predict future responses.

Carl Rogers, the famous humanistic psychologist, divides feedback into five categories:

1. Evaluative
2. Interpretive
3. Supportive
4. Probing
5. Understanding

These five types of feedback vary in their frequency and effectiveness (Rogers, 1961; Rogers, 1970)., This framework highlights aspects of feedback that serve as opportunities for the business writer, as he or she recognizes feedback as an essential part of writing and the communication process. Let's examine the five types of feedback, as presented by Rogers, in their order of frequency.

Evaluative Feedback

This type of feedback is the most common. Evaluative feedback often involves judgment of the writer and his or her ethos (or credibility). We look for credibility clues when we examine the letterhead; feel the stationery; or read the message and note the professional language, correct grammar, and lack of spelling errors. Conversely, if the writer's credibility is undermined by errors, is perceived to be inappropriately informal, or presents questionable claims, the reader's view of the writer will be negative. The reader is less likely to read or respond to the message communicated by a source judged to lack credibility.

In an interpersonal context, evaluative feedback may be communicated as a lack of eye contact, a frequent glance at a cell phone, or an overt act to avoid communication, such as walking away from the speaker. In written communication, we don't have the opportunity to watch the reader "walk away." As a business writer, your ethos is an important part of the message.

In aspects of interpersonal interaction, behavioral evaluations are one type of evaluative feedback. A behavioral evaluation assesses the action and not the actor, but the business writer lacks this context. You don't always know when or where your content will be read and evaluated, so it is in your best interest to be consistently professional. Fact checking, elimination of errors, and a professional image should be habits, not efforts of will. They should be an automatic part of the writing process for any business writer.

Interpretive Feedback

In the course of a conversation, you may not be completely sure you heard correctly, so it is often a good idea to paraphrase or restate what you heard as a way of requesting confirmation or clarification. You may also understand what was said, but restate the main point as a way of communicating attention. Listening is hard to assess in any conversation, and interpretive feedback allows the speaker to hear a clear demonstration of feedback that confirms that the message was understood or needs correction. Interpretive feedback requests confirmation or clarification of a message, and is often expressed in the form of a question.

In hard copy documents, we normally lack this feedback loop, but online documents increasingly allow for this form of exchange. You may find a "Comments" button at the end of an online article. When you click on the button, a text box will appear, providing a space and a medium for feedback from readers to the author, allowing an opportunity to respond with opinions, interpretations, and questions sparked by the article. Blogs incorporated this feature early in the development of Web content, but you can see variations of this feedback style all over the Web. This form of feedback is increasingly common in Facebook's wall, in MySpace's comment box, and even in an article published in the online version of the *Wall Street Journal*.

Supportive Feedback

You come in second in a marathon to which you have dedicated the better part of a year in training. It was a challenging race and you are full of mixed emotions. The hug from your partner communicates support and meets your need in ways that transcend language and the exchange of symbolic meaning. In an interpersonal context it is easy to identify, describe, and even predict many representations of supportive feedback, but in other communication contexts it can prove a significant challenge.

You may give yourself encouragement as you mentally prepare for the race, and may receive backslaps and hugs after the race, but when you write about your experience, how do you experience supportive feedback? In the same way you receive evaluative or interpretive feedback via comments or to your Facebook wall, you may receive supportive feedback. Supportive feedback communicates encouragement in response to a message.

Probing Feedback

As you've read an article, have you ever wanted to learn more? Increasingly, embedded links allow a reader to explore related themes and content that give depth and breadth to content, but require the reader to be self-directed. Probing feedback communicates targeted requests for specific information. As an author, you've crafted the message and defined what information is included and what is beyond the scope of your document, but not every reader may agree with your framework. Some may perceive that a related idea is essential to the article, and specifically request additional information as a way of indicating that it should be included. Rather than responding defensively to requests for specific information and interpreting them as challenges to your authority as the author, see them for what they are: probing feedback. They are opportunities that you should respond to positively with the view that each is an opportunity to interact, clarify, and promote your position, product, or service.

Keeping a positive attitude is an important part of writing in general and feedback in particular. Not everyone is as skilled with words as you are, so their probing feedback may appear on the surface to be less than diplomatic; it may even come across as rude, ignorant, or unprofessional. But it will be to your advantage to see through the poor packaging of their feedback for the essential request, and respond in a positive, professional fashion.

Understanding Feedback

Rogers discussed the innate tendency for humans to desire to be understood (Rogers, 1961; Rogers, 1970). We, at times, may express frustration associated with a project at work. As we express ourselves to those we choose to share with, we seek not only information or solutions, but also acceptance and respect. We may not even want a solution, or need any information, but may simply want to be heard. Understanding feedback communicates sympathy and empathy for the source of the message.

As a business writer, you want your writing to be understood. When you receive feedback, it may not always be supportive or encouraging. Feedback is not always constructive, but it is always productive. Even if the feedback fails to demonstrate understanding or support for your cause or point, it demonstrates interest in the topic.

As a skilled communicator, you can recognize the types of feedback you are likely to receive from readers and can recognize that your readers may also desire feedback. Sometimes an author may communicate respect and understanding in a follow-up message. By providing a clarification, the writer can develop the relationship with the reader. Being professional involves keeping your goals in mind, and in order for your writing to be successful, you will need a positive relationship with your readers.

Key Takeaway

Feedback may be evaluative, interpretive, supportive, probing, or understanding, and it is always an opportunity for growth.

Exercises

1. Select a piece of writing such as an article from a Web site, newspaper, or magazine. Write at least one sentence of feedback in each of the five types described in this section. Do you find one type of feedback easier to give than another? If you were the author, how would you feel receiving this feedback? Discuss your thoughts with your classmates.
2. Review a Web site, article, or similar presentation of information. Focus on strengths and weaknesses from your perception and write a brief analysis and review. Please post your results and compare with classmates.
3. Find a blog or online article with comments posted after the document. Choose one example of feedback from the comments and share it with your classmates. Note any trends or themes that present themselves as you explore the comments.
4. Create a blog and post an opinion or editorial article. What kinds of feedback do you get from your readers? Compare and contrast your experiences with those of your classmates.

References

Rogers, C. R. (1961). *On becoming a person: A therapist's view of psychotherapy*. Boston, MA: Houghton Mifflin.

Rogers, C. R. (1970). *On encouter groups*. New York, NY: Harper & Row.

4.1.4: Additional Resources

Online Writing Laboratory (OWL) at Purdue has a comprehensive guide to the writing process. http://owl.english.purdue.edu

The newsletter *Managing Work Relations* offers an article on the grapevine and workplace gossip. www.workrelationships.com/site/newsletter/issue1.htm

Visit this About.com page for an informative article for managers on how to deliver feedback to subordinates. http://humanresources.about.com/cs/communication/ht/Feedbackimpact.htm

Read an inspiring story about feedback on this Helium.com page. www.helium.com/items/1231747-communication-skills-providing-feedback-that-has-an-impact

Read more about how to accept and benefit from feedback in this e-zine article. http://ezinearticles.com/?Workplace-Communication—Accepting-Feedback&id=2147532

Study Guides and Strategies presents an article on how to benefit from feedback when working with a tutor. www.studygs.net/feedback.htm

AllBusiness presents an article on the five main methods of market research. www.allbusiness.com/marketing/market-research/1287-1.html

Free Management Library presents an in-depth article on market research. http://managementhelp.org/mrktng/mk_rsrch/mk_rsrch.htm

Explore the home page of SurveyMonkey and learn about some of the decisions that need to be made in the process of designing a survey. http://www.surveymonkey.com

Read an article on how to organize a focus group by Carter McNamara, MBA, PhD. http://managementhelp.org/evaluatn/focusgrp.htm

Writers often receive feedback by having their documents edited. Read about what an editor does on the home page of KOK Edit. http://www.kokedit.com

ChangingMinds.org discusses Rogers's five feedback types with examples. http://changingminds.org/techniques/conversation/reflecting/rogers_feedback.htm

SECTION OVERVIEW

4.2: Developing Business Presentations

Thumbnail: pixabay.com/photos/agreement...iness-3408113/

4.2.1: Before You Choose a Topic

Learning Objectives

1. Describe the steps in the process of planning a speech.

As you begin to think about choosing your topic, there are a few key factors to consider. These include the purpose of the speech, its projected time length, the appropriateness of the topic for your audience, and your knowledge or the amount of information you can access on the topic. Let's examine each of these factors.

Determine the General and Specific Purpose

It is important for you to have a clear understanding of your purpose, as all the other factors depend on it. Here's a brief review of the five general purposes for speaking in public:

1. *Speech to inform*. Increase the audience's knowledge, teach about a topic or issue, and share your expertise.
2. *Speech to demonstrate*. Show the audience how to use, operate, or do something.
3. *Speech to persuade*. Influence the audience by presenting arguments intended to change attitudes, beliefs, or values.
4. *Speech to entertain*. Amuse the audience by engaging them in a relatively light-hearted speech that may have a serious point or goal.
5. *Ceremonial speech*. Perform a ritual function, such as give a toast at a wedding reception or a eulogy at a funeral.

You should be able to choose one of these options. If you find that your speech may fall into more than one category, you may need to get a better understanding of the assignment or goal. Starting out with a clear understanding of why you are doing what you are supposed do will go a long way in helping you organize, focus, prepare, and deliver your oral presentation.

Once you have determined your general purpose—or had it determined for you, if this is an assigned speech—you will still need to write your specific purpose. What specifically are you going to inform, persuade, demonstrate, or entertain your audience with? What type of ceremony is your speech intended for? A clear goal makes it much easier to develop an effective speech. Try to write in just one sentence exactly what you are going to do.

Examples
To inform the audience about my favorite car, the Ford Mustang
To persuade the audience that global warming is a threat to the environment

Notice that each example includes two pieces of information. The first is the general purpose (to inform or to persuade) and the second is the specific subject you intend to talk about.

Can I Cover the Topic in Time?

Your next key consideration is the amount of time in which you intend to accomplish your purpose. Consider the depth, scope, and amount of information available on the topic you have in mind. In business situations, speeches or presentations vary greatly in length, but most often the speaker needs to get the message across as quickly as possible—for example, in less than five minutes. If you are giving a speech in class, it will typically be five to seven minutes; at most it may be up to ten minutes. In those ten minutes, it would be impossible to tell your audience about the complete history of the Ford Mustang automobile. You could, however, tell them about four key body style changes since 1965. If your topic is still too broad, narrow it down into something you can reasonably cover in the time allotted. For example, focus on just the classic Mustangs, the individual differences by year, and how to tell them apart.

You may have been assigned a persuasive speech topic, linking global warming to business, but have you been given enough time to present a thorough speech on why human growth and consumption is clearly linked to global warming? Are you supposed to discuss "green" strategies of energy conservation in business, for example? The topic of global warming is quite complex, and by definition involves a great deal of information, debate over interpretations of data, and analysis on the diverse global impacts. Rather than try to explore the chemistry, the corporate debates, or the current government activities that may be involved, you can consider how visual aids may make the speech vivid for the audience. You might decide to focus on three clear examples of global warming to capture your audience's attention and move them closer to your stated position: "green" and energy-saving strategies are good for business.

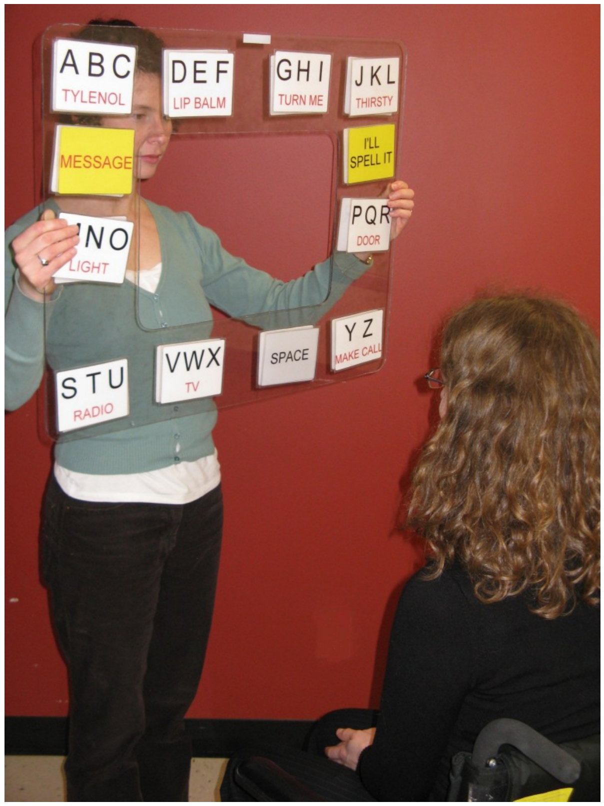

Figure 4.2.1.1: Visual aids may make this speech vivid for the audience. Wikimedia Commons – CC BY-SA 3.0.

Perhaps you'll start with a brownie on a plate with a big scoop of ice cream on top, asking your audience what will happen when the ice cream melts. They will probably predict that the melted ice cream will spread out over the plate in a puddle, becoming a deeper puddle as the ice cream continues to melt. Next, you might display a chart showing that globally, temperatures have risen, followed by a map of the islands that have lost beaches due to rising tides. To explain how this had happened, you may show two pictures of Antarctica—one taken in 1993 and the other in 2003, after it lost over 15 percent of its total mass as the Ross Ice Shelf melted, cracked, and broke off from the continent. You may then make a transition to what happens when water evaporates as it goes into the atmosphere. Show a picture of the hole in the ozone over Chile and much of South America, and hold up a bottle of sunscreen, saying that even SPF 45 isn't strong enough to protect you. Finally, you may show a pie graph that illustrates that customers are aware of the environmental changes and the extent of their purchase decision is based on the perception of a product's "green" features or support of related initiatives. In just a few minutes, you've given seven visual examples to support your central position and meet your stated purpose.

Will My Topic Be Interesting to My Audience?

Remember that communication is a two-way process; even if you are the only one speaking, the audience is an essential part of your speech. Put yourself in their place and imagine how to make your topic relevant for them. What information will they actually use once your speech is over?

For example, if you are speaking to a group of auto mechanics who specialize in repairing and maintaining classic cars, it might make sense to inform them about the body features of the Mustang, but they may already be quite knowledgeable about these features. If you represent a new rust treatment product used in the restoration process, they may be more interested in how it works than any specific model of car. However, if your audience belong to a general group of students or would-be car buyers, it would be more useful to inform them about how to buy a classic car and what to look for. General issues of rust may be more relevant, and can still be clearly linked to your new rust treatment product.

For a persuasive speech, in addition to considering the audience's interests, you will also want to gauge their attitudes and beliefs. If you are speaking about global warming to a group of scientists, you can probably assume that they are familiar with the basic facts of melting glaciers, rising sea levels, and ozone depletion. In that case, you might want to focus on something more specific, such as strategies for reducing greenhouse gases that can be implemented by business and industry. Your goal might be to persuade this audience to advocate for such strategies, and support or even endorse the gradual implementation of the cost- and energy-saving methods that may not solve all the problems at once, but serve as an important first step.

In contrast, for a general audience, you may anticipate skepticism that global warming is even occurring, or that it poses any threat to the environment. Some audience members may question the cost savings, while others may assert that the steps are not nearly enough to make a difference. The clear, visual examples described above will help get your point across, but if you are also prepared to answer questions—for example, “If the earth is heating up, why has it been so cold here lately?” or “Isn’t this just part of a warming and cooling cycle that’s been happening for millions of years?”—you may make your speech ultimately more effective. By asking your listeners to consider what other signs they can observe that global warming is occurring, you might highlight a way for them to apply your speech beyond the classroom setting. By taking small steps as you introduce your assertions, rather than advocating a complete overhaul of the system or even revolution, you will more effectively engage a larger percentage of your audience.

How Much Information about My Topic Is Readily Available?

For a short speech, especially if it is a speech to entertain, you may be able to rely completely on your knowledge and ideas. But in most cases you will need to gather information so that you can make your speech interesting by telling the audience things they don’t already know. Try to choose a topic that can be researched in your college or university libraries. You may need to do some initial checking of sources to be sure the material is available.

Putting It All Together

When you have determined your general purpose, the amount of material appropriate to the time allowed for your speech, and the appropriateness for your audience, then you should be well on your way to identifying the topic for your speech. As a double-check, you should be able to state your specific purpose in one sentence. For example, the specific purpose of our “Classic Cars” speech could be stated as, “By the end of my speech, I want my audience to be more informed about the three ways in which they can determine whether a classic car is a rust bucket or diamond in the rough, and be aware of one product solution.”

Key Takeaway

Speech planning begins with knowing your general and specific purpose, your time allotment, your audience, and the amount of information available.

Exercises

1. Complete the following sentence for your speech: By the end of my speech, I want the audience to be more informed (persuaded, have a better understanding of, entertained by) about ___________________.

   If you can’t finish the sentence, you need to go back and review the steps in this section. Make sure you have given them sufficient time and attention. An effective speech requires planning and preparation, and that takes time. Know your general and specific purpose, and make sure you can write it in one sentence. If you don’t know your purpose, the audience won’t either.

2. Make a list of topic that interest you and meet the objectives of the assignment. Trade the list with a classmate and encircle three topics that you would like to learn more about on their list. Repeat this exercise. What topic received the most interest and why? Discuss the results with your classmates.

4.2.2: Choosing a Topic

Learning Objectives

1. Identify the general purpose and specific purpose of a speech

Now that you have a clear idea of your general and specific purpose, the allotted time, your audience's expectations, and the amount of information available, you are ready to commit to a topic. We have several strategies you can use to help select and narrow the topic appropriately.

Know Yourself and Your Audience

The first strategy is to identify an area of knowledge or an issue that deeply interests you. If you have not already completed the first of the Note 10.1 "Introductory Exercises" for this chapter, please work with it, identifying as many activities, areas of interest, places you've traveled to, and things you find interesting as possible. Once you have completed the exercise, identify three broad subject areas where you have some knowledge or experience and consider at least one link to business and industry for each area. Talking about what you know will make you a more credibility speaker but it must clearly connect with your employer's goals for your presentation. If, for example, you like doing a scrapbook, what kind of glue do you prefer and why? That may make for a natural speech topic that calls on your previous experience while requiring you to learn more about the glue and its properties. You may need to compare and contrast several types of glues as part of your preparation. Your in-depth awareness of scrapbooking and glue as a necessary ingredient will make you a more credible speaker.

In the first of the Note 10.1 "Introductory Exercises" for this chapter, you were asked to choose three questions from the list and then survey people you know to find out which of the three they prefer to hear about. Make sure you keep score by writing down factors like age, gender, and any other elements you think your audience may have in common. This exercise serves to reinforce the idea of being audience-centered, or tailoring your message to your specific audience. Our third of the Note 10.1 "Introductory Exercises" for this chapter should highlight that our perception of the world is not always accurate, and there is no substitute for thorough, objective research when preparing a speech. The more you know, about yourself and your audience, the better you can prepare to meet their needs and accomplish your goals as a speaker.

You have now utilized the Note 10.1 "Introductory Exercises" to help identify some broad topic areas that might work for you. If you find the topic interesting, your enthusiasm will show and your audience will become interested, too. Next, you will want to decide which of these areas would work best for your speech, and how to narrow it down.

Saving Time

Here are some strategies you can use to save yourself time in selecting a speech topic.

First, consider the information you already have close at hand. Do you already have a project you are working on, perhaps in another course? What are you currently studying in your other classes? What topics do you want to know more about? Which issues or aspects initially drew you to this topic or area? Chances are that whatever piqued your interest the first time will also get your audience interested.

Next, conduct a search (online, in the library, or interview people you know) in your subject area to get an overview of the subject. Explore topics, issues, places, or people that fascinate you.

Appeal, Appropriateness, and Ability

These are three main factors to consider when choosing a topic. All three factors are related to one another, but by systematically focusing on each one you will help address the strengths and weaknesses of your chosen topic.

Appeal involves the attractive power of arousing a sympathetic, stimulated response from the audience. Your audience will have expectations of you as a speaker and of your purpose for speaking. We all tend to seek novelty and find interesting, attractive, or appealing, or something that is not part of everyday life. A good example is the melting ice cream used in the speech on global warming. The elements are nothing new. We've all seen plates, brownies, and ice cream before, but how many of us have seen a speaker use them together to symbolize the melting ice caps associated with global warming? There is an inherent novelty present when we adapt something from its original purpose in order to make it appealing. You will need to consider an appealing way to start your speech, and will look for ways throughout your speech to reaffirm that appeal to the audience. When considering a topic, also think about the visual or auditory images that come to mind, or how you might represent it to an audience in ways other than your words. This can guide you as you proceed to select your topic, thinking about what you can make appealing to your audience.

It also follows that appeal applies to the speaker as well as the audience. You may find the prospect of discussing global warming not very interesting, and if you feel this way, it will come through in your speech. You need to be attracted, interested or find your topic appealing in order to convey this appeal to your audience. Find something that catches your interest, and that same spark is what you will cultivate to develop ways to stimulate the spark of curiosity in your audience.

Appropriateness involves a topic that is especially suitable or compatible with your audience's interest, expectations, norms, or customs. Everyone will have expectations about roles and outcomes associated with your speech. Some may be looking for information, while others may already know something about your topic and want to learn more. You will need to reach both groups within the audience. As we saw earlier in the Ford Mustang example, a highly technical speech may lose the more novice members of your audience.

Appropriateness is important because some topics do not work as well in a classroom setting as others. Will everyone find a new rust treatment product interesting? Will everyone find a car speech interesting? Whether you are in the classroom or business office setting, consider your audience and the appropriateness of your topic.

Regardless where you give a speech, you should always choose topics that will not promote harmful or illegal actions. It is also important to consider whether your topic might offend members of the audience. If this is a possibility, can you find a way to present the topic that will minimize offense? Similarly, if your topic is controversial and you know that your audience has strong feelings about it, consider how you can convey your message without alienating or antagonizing your listeners. Finally, it is usually wise to avoid topics, which the audience already knows a lot about.

Ability involves the natural aptitude or acquired proficiency to be able to perform. If you have a lot of prior information on flying, gained over years of experience being at the controls of an aircraft, you may have a natural aptitude and knowledge base to use to your advantage. If, however, you've never flown before, you may need to gather information and go visit an airport to be able to approach a proficient level of understanding to discuss the topic.

In addition to your ability to draw on your natural strengths, you'll also want to consider your ability to research a topic where you are located. If you want to develop a speech on a particular topic but you find information hard to come by, this will make your job even harder and could possibly have a detrimental impact on your speech. You may find that two similar topics interest you but your ability to gather information from more diverse sources, from places that are more readily available, or from your background and experience make one topic more attractive than the other.

Figure 4.2.2.2: Consider your audience and the appropriateness of your topic, product, or service for success. Steve Jurvetson – Audience – CC BY 2.0.

Consider topics that are,

- new,
- possibly controversial,

- clear,
- supported by information you can find in outside sources,
- interesting to you.

Individual course guidelines vary, so make sure that your instructor approves your topic, and that your topic is appropriate for your audience. At some colleges and universities, broad topics are designated as part of the curriculum including, for example, environment, diversity, and technology. In your class, you may be challenged to link any of those topics to business, and to prepare an informative or persuasive speech. Some colleges and university instructors may also encourage you not to choose topics that have been done repeatedly over the years, like abortion or the death penalty, unless you can connect the issue to a current event or new perspective. Don't avoid all controversial topics, as they often intrigue your audience and help maintain interest. Just make sure to consider the pre-existing attitudes of your audience when attempting to create an effective, engaging speech.

In a business setting, you will rarely be given complete freedom to choose your topic. You may even have a script and visual aids prepared in advance. In the real world the luxury of time for preparation and topic selection are rare, but in a classroom setting you are often given more of an opportunity to choose. That choice should not be taken lightly, and should be viewed as an opportunity. The classroom is a training ground, and your freedom to explore and experiment is designed to build skills and strengths. When you join an employer, you will be asked to prepare a presentation as part of the job; more often than not, there are clear guidelines on what is acceptable and your professionalism is expected.

Use Your Self-Inventory

Choosing a topic can be difficult, but your self-inventory of things you already know should get you started. By doing a little exploring, you can often help yourself come up with several possible topics. The topic itself will not exclusively make a "good" or "bad" speech. How you develop that topic and discuss its points and issues, however, will make a significant impact. Before moving on to the next step in this chapter, make sure you have a topic in which you are relatively confident. If you have trouble selecting a topic, take your self-inventory to your instructor or librarian. They may be able to help guide you to a topic that works for you.

Here are some examples to get you started. Let's say your self-inventory response from the first of the Note 10.1 "Introductory Exercises" for this chapter to the question, "**What do you play or do for fun**?" is to play sports, and it also happens to be one way you are earning your way through school on a scholarship. You could consider a topic like the history of your sport for an informative speech, or how to tell the difference between three classic types of pitches in baseball, and which you can involve an audience member for a demonstrative speech. You could also consider stereotypes of athletes in college and some of the common misperceptions and persuade the audience that athletes often handle the issues of time management well, can get good grades (provide statistics as evidence and ask a coach for examples), and are actively developing both their minds and their bodies through participation in sports. You might even take on a topic of why basketball is more interesting than football, or vice versa. You might decide instead to entertain the audience, and tell stories associated with game travel, buses breaking down, or road trips gone bad. Finally, you might put together a ceremonial speech honoring an Academic All-American player, recognizing his or her excellence both in academics and in athletics.

If you are not a student athlete, but a college student, you may have answered that same question by indicating you are taking classes for a degree as well as for fun. You could put together an informative speech on the steps involved in applying for financial aid, or produce a demonstrative speech on how to gather the information required and complete the application process. You might persuade the audience to apply for financial aid, even if they think they might not be eligible, and cover the options within the program. You might entertain the audience with funny stories about the challenges of registering for classes, completing financial aid, and completing the classes you need to graduate. (There is always just one more class, right?) You might also draft a ceremonial speech as if you were presenting the commencement speech at your graduation.

These two scenarios should stimulate some ideas, or you might already have a clear purpose and topic in mind. It's important to be clear on both your purpose and your topic as you begin to put pencil to paper, or keystroke to computer, and begin the process of writing your general purpose and thesis statements.

Writing Your Thesis Statement

Earlier in the chapter you wrote a statement expressing the general and specific purpose of your speech. Now that you have explored further and identified a definite topic, it's time to write a thesis statement. This thesis statement should be a short, specific sentence capturing the central idea of your speech. Steven Beebe and Susan Beebe recommend five guiding principles when considering your thesis statement. The thesis statement should

1. be a declarative statement;
2. be a complete sentence;
3. use specific language, not vague generalities;
4. be a single idea;
5. reflect consideration of the audience.

For example, if you plan to inform a general audience about the Ford Mustang, a good thesis statement might be, “Ford produced five ‘generations’ of the Mustang, each with a distinctive body style that audience members can learn to recognize.” If you plan to persuade a group of investors that a beachfront property could be threatened by rising sea levels, a good thesis statement might be, “Sea levels are predicted to rise because of global warming, and if these predictions are correct, the beachfront property my audience is considering investing in may be threatened.”

The thesis statement is key to the success of your speech. If your audience has to work to find out what exactly you are talking about, or what your stated purpose or goal is, they will be less likely to listen, be impacted, or recall your speech. By stating your point clearly in your introduction, and then referring back to it during your speech, you promote the cognitive strategies of emphasis, clarity, and conciseness, and help your audience to listen while meeting the expectations of the rhetorical context.

Key Takeaway

Choosing a speech topic involves knowing yourself and your audience; using efficient strategies; and understanding appeal, appropriateness, and ability. When you have accomplished these steps, you will be able to write a good thesis statement.

Exercises

1. Which of the following qualify as good thesis statements? Take any that are faulty and rewrite them to remedy their weaknesses.
   1. Living in the desert as we do, my listeners and I can grow many beautiful and interesting plants in our gardens without using large amounts of water.
   2. To inform patients about how the medical insurance claims process works.
   3. Because recent research suggests children develop positive self-esteem through recognition for their achievements, not from indiscriminate praise, I will persuade the parents and teachers in my audience to modify their behavior toward children.
   4. Tourists can learn a lot from visiting the European battlefields of World War II, and unexploded land mines from past wars are a serious problem throughout the world.
   5. As a student attending this college on an athletic scholarship, I lead a very busy life because I am responsible for working hard at my sport as well as being held to the same academic standards as the nonathlete students in my audience.

   Answers: Examples a, c, and e are good thesis statements. Example b is not a complete sentence. Example d contains more than one main idea.
2. From your list of possible topics, write several sample purpose or thesis statements. Share and compare your results with classmates.
3. Write a general purpose statement and thesis statement for a speech to inform. Now adapt these statements for a speech to persuade.

References

Beebe, S. [Steven], & Beebe, S. [Susan]. (1997). *Public speaking: An audience-centered approach* (3rd ed.). Boston, MA: Allyn & Bacon.

4.2.3: Finding Resources

Learning Objectives

1. Understand the importance of research in developing your topic.
2. Use resources to gather information effectively.
3. Document your sources correctly and avoid plagiarism.

Now that you know your general purpose, have committed to a topic, and have written your thesis statement, it's time to gather information. If you have chosen the topic from your list, you probably already know a lot about it. But in most cases you will still need information from sources other than yourself, to establish credibility, create a more comprehensive speech, and to make sure no important aspect of your topic is left out.

Your time is valuable and you'll need to plan ahead to avoid a rushed frenzy right before your due date. You'll feel more confident if you budget your time wisely and give yourself an opportunity to reflect on what you have prepared, and this will help you feel more relaxed as you deliver your speech, reducing your speech anxiety.

Narrow Your Topic and Focus on Key Points

By now you have developed an idea of your topic, but even with your purpose and thesis statement, you may still have a broad subject that will be a challenge to cover within the allotted time. You might want to revisit your purpose and thesis statement and ask yourself: how specific is my topic? If flying an airplane is your topic area and you are going to inform your audience on the experience, discuss the history and basic equipment, and cover the basic requirements necessary to go on your first flight. Plus, look at reference information on where your audience could go locally to take flying lessons, you might find that five to seven minutes simply is not enough time. Rather than stating that you need more time, or that you'll just rush through it, consider your audience and what they might want to learn. How can you narrow your topic to better consider their needs? As you edit your topic, considering what is essential information and what can be cut, you'll come to focus on the key points naturally and reduce the pressure on yourself to cover too much information in a short amount of time.

If you haven't presented many speeches, five to seven minutes may seem like an eternity, but when you are in front of the audience, the time will pass quickly. Consider how you feel about the areas of your speech and you'll soon see how it could easily turn into an hour-long presentation. You need to work within the time limits, and show your audience respect as you stay within them, recognizing that they too will be presenting speeches in the same time frame. For yourself and your audience, narrow your topic to just the key points. Perhaps you will begin with a description and a visual image of your first flight, followed by a list of the basic equipment and training needed. Finally, a reference to local flying schools may help you define your speech. While the history of flying may be fascinating, and may serve as a topic in itself for another speech, it would add too much information to this particular brief speech.

As you begin this process, keep an open mind for the reference materials available. The access to information on the Internet is amazing, but not all the information has equal value. Try not to just go with the first three examples, Web sites or sources you run across but instead skim, rather than read in-depth, the information at that relates to your topic and what you find of interest. Look for abstracts, or brief summaries of information, before you commit time to reading an article all the way through. Look for indexes to identify key terms you might want to cover before eliminating them as you narrow your topic. Take notes as you search or bookmark pages with you Web browser in order to go back to a site or source that at first you passed over, but now think may make a relevant contribution to your speech. Consider the source and their credibility. While a high school Web page assignment may prove interesting, the link to the research in the field, the author of a study, or a university source may provide much credible information. Once you have identified sources you consider to be valuable, you will assemble the information and key points needed to make your speech effective much better.

Plan Your Search for Information

When preparing a speech, it is important to gather information from books, magazines, newspapers, electronic sources, and interviews from people who know a lot about your topic. With information from a variety of sources, you will have many possibilities when it comes to developing your speech. If you keep in mind the key information you need to support your thesis, you will save yourself time, as you can choose and edit information as you go along. Also, consider your other responsibilities in other classes or with work and family. You'll have to schedule time for your investigation and make it a priority, but it will necessarily compete with other priorities. Perhaps scheduling for yourself time in the library, a visit to the local flight school to interview a flight instructor, and some Internet search time in the evenings may help you create a to-do list that you can use to structure your research. Remember that this investigation will be more fun if your topic is one in which you are actually interested.

Before you go to the library, look over your information sources. Do you read a magazine that relates to the topic? Did you read a recent news article that might be relevant? Is there a book, CD-ROM, or music that has information you can use? Think of what you want your audience to know, and how you could show it to them. Perhaps cover art from a CD, or line from a poem may make an important contribution to your speech. You might even know someone who has experience in the area you want to research.

As you begin to investigate your topic, make sure you consider several sides of an issue. Let's say you are going to make an informative speech at a town council meeting about the recent history of commuter rail service in your town. At first, you may have looked at two sides, rail versus private cars. Automobile dealers, oil companies, and individual drivers wanted the flexibility of travel by car, while rail advocates argued that commuter trains would lower costs and energy consumption. If you take another look, you see that several other perspectives also have bearing on this issue. Many workers commuted by bus prior to the railroad, so the bus companies would not want the competition. Property owners objected to the noise of trains and the issue of eminent domain (i.e., taking of private property by the government). To serve several towns that are separated by open space, the rail lines cut through wildlife habitat and migration corridors. We now have five perspectives to the central issue, which makes the topic all the more interesting.

Make sure, as you start your investigation for information, that you always question the credibility of the information. Sources may have no review by peers or editor, and the information may be misleading, biased, or even false. Be a wise information consumer.

Ethics, Content Selection, and Avoiding Plagiarism

An aspect of sifting and sorting information involves how you will ethically present your material. You may be tempted to omit information that may be perceived as negative or may not be well received. For example, you may be tempted to omit mention of several train accidents that have occurred, or of the fact that train fares have risen as service has been cut back. If your purpose is to inform, you owe it to your audience to give an honest presentation of the available facts. By omitting information, you are not presenting an accurate picture, and may mislead your audience. Even if your purpose is to persuade, omitting the opposing points will present a one-sided presentation. The audience will naturally consider what you are not telling them as well as what you are presenting, and will raise questions. Instead, consider your responsibility as a speaker to present all the information you understand to be complete, and do it honestly and ethically.

As another example, suppose you work for a swimming pool construction company and are speaking to inform a neighborhood group about pool safety. You have photos of pools you have worked on, but they aren't very exciting. There are many more glamorous swimming pool photos on free Internet sites. Who can really tell if the pool in the picture is yours or not? Furthermore, the "Terms of Use" on the site state that photos may be downloaded for personal use. Wouldn't this speech to inform be considered personal use? In fact, it probably would not, even if your informative speech is not a direct sales pitch. And even if you don't actually tell your audience, "My company built this pool," it would be reasonable for them to assume you did unless you specifically tell them otherwise.

As a student, you are no doubt already aware that failing to cite sources or including a sentence or paragraph you copied from a blog on the Internet for an English essay is called plagiarism and is grounds for an F on your paper. At many schools, plagiarism can even be grounds for expulsion. Similarly, in your professional life it behooves you to be truthful with your audience and give credit where credit is due for several reasons. First, misrepresenting your employer's work could be illegal under statutes related to fraud; it could put not only your job but also your employer's contractor license in jeopardy. Second, someone in your audience could recognize one of the photos (after all, they can browse the Internet as easily as you can) and embarrass you by pointing it out during your presentation. Third, by using photos that display your company's actual work you will feel more confident, reducing your speech anxiety. You have a responsibility to your audience and engaging in plagiarism fails in that responsibility.

Staying Organized

Before you start browsing on your computer, go to the library, or make the trip for an interview, make sure you have designated a space where you can keep all your materials in one place. Decide on a name for the project and use it to set up a subdirectory in your computer as well as a physical receptacle, such as a cardboard box or a manila folder.

As you gather information online, open a new document in whatever writing program you use and save it as "Sources." Every time you find information that may prove useful, copy the Web address or reference/citation information and paste it into your document. If you are gathering information from books or periodicals, use one sheet of paper as your "Sources" document. This will save you a lot of time later when you are polishing your speech.

Plan to use your time effectively. What information do you hope to find in the library? Make a list. Try to combine tasks and get your investigation completed efficiently. Go to the library once with a list, rather than three times without one. Ask the research librarian for assistance in grouping information and where to find it.

As you search through articles, books, Web sites, and images for your presentation, consider how each element relates specifically to the key points in your speech. Don't just look for the first citation or reference that fits your list. Rushing through the research process can result in leaving out key areas of support or illustration in your speech, an outcome you may not be happy with. Instead, enjoy the fun of searching for material for your speech—but be aware that it is easy for your list under each key point to grow and grow with "must include" information. As we discussed earlier, narrowing your topic is a key strategy in crafting a good speech. Try not to "commit" to information until you have gathered more than you need, then go back and choose the most relevant and most interesting facts, quotations, and visual aids.

You might think of this as the "accordion phase" of preparing your speech, as the amount of material first gets bigger and then smaller. You'll feel a sense of loss as you edit and come to realize that your time frame simply does not allow for all the great information you found—but remember that nobody else will know what *didn't* go into your speech, they will just appreciate the good material you did choose. As you sift through information, look for the promising, effective elements to include and omit the rest. In your English class, you often need to edit and revise a paper to produce a rough draft before your final draft. This process parallels the production of a rough draft. By taking notes with your key point in mind, you'll begin to see your speech come together.

Searching for Information on the Internet

Finding information on the Internet or in electronic databases can decrease your search time, but you will still need to budget time to accomplish the tasks associated with reviewing, selecting, interpreting, and incorporating information to your particular use.

The World Wide Web is an amazing source of information, but for that very reason, it is difficult to get information you actually need. Let's look at two issues that can make searching online easier: where and how to search for information.

Knowing where to go for information is as important as knowing key words and concepts related to your topic. Do you need general information? Do you need to survey what's available quickly? Do you prefer searching only reviewed sites? Is your topic education-related? Depending on your answer, you may want to consider where to start your search.

Table $4.2.3.1$presents a summary of main search engines and how they might work for you.

Table $4.2.3.1$Some Examples of Internet Search Sites

Description	URL
General Web searches that can also be customized according to categories like news, maps, images, video	• At the end of this chapter under "Additional Resources," you will find a list of many Web sites that may be useful for public speaking research. **Evaluating Your Sources** It is important to be aware of how much online information is incomplete, outdated, misleading, or downright false. Anyone can put up a Web site, and once it is up the owner may or may not enter updates or corrections on a regular basis. Anyone can write a blog on any subject, whether or not that person actually knows much about that subject. Anyone who wishes to contribute to a Wikipedia article can do so—although the postings are moderated by editors who have to register and submit their qualifications. In the United States, the First Amendment to the Constitution guarantees freedom of expression. This freedom is restricted by laws against libel (false accusations against a person) and indecency, especially child pornography, but those laws can be difficult to enforce. It is always important to look beyond the surface of a site to who sponsors it, where the information displayed came from, and whether the site owner has a certain agenda.

Description	URL
	In gathering information for your speech, you will want to draw on reputable, reliable sources—printed ones as well as electronic ones—because they reflect on the credibility of the message, and the messenger. Analyzing and assessing information is an important skill in speech preparation, and here are six main points to consider when evaluating a document, presentation, or similar source of information (Paul, R., and Elder, L., 2007). In general, documents that represent quality reasoning have ◦ a clearly articulated purpose and goal; ◦ a question, problem, or issue to address; ◦ information, data, and evidence that is clearly relevant to the stated purpose and goals; ◦ inferences or interpretations that lead to conclusions based on the presented information, data, and evidence; ◦ a frame of reference or point of view that is clearly articulated; ◦ assumptions, concepts, and ideas that are clearly articulated An additional question to ask is *how credible the source* is. This question can be hard to answer even with years of training and expertise. Academic researchers have been trained in the objective, impartial use of the scientific method to determine validity and reliability. But as research is increasingly dependent on funding, and funding often brings specific points of view and agendas with it, pure research can be—and has been—compromised. You can no longer simply assume that "studies show" something without finding out who conducted the study, how it was conducted, and who funded the effort. This may sound like a lot of investigation and present quite a challenge, but again it is worth the effort. Information literacy is an essential skill set in the process of speech preparation. As you learn to spot key signs of information that will not serve to enhance your credibility and contribute to your presentation, you can increase your effectiveness as you research and analyze your resources. For example, suppose you are preparing an informative speech on safety in the workplace. You might come upon a site owned by a consulting company that specializes in safety analysis. The site might give many statistics, illustrating the frequency of on-the-job accidents, repetitive motion injuries, workplace violence, and so on. But the sources of these percentage figures may not be credited. As an intelligent researcher, you need to ask yourself whether the consulting company that owns the site performed its own research to get these numbers. Most likely it did not—so why are the sources not cited? Moreover, such a site would unlikely mention any free workplace safety resources available and free from sources such as the U.S. Occupational Safety and Health Administration (OSHA). Less biased sources of information would be the American Management Association, the U.S. Department of Labor, and other not-for-profit organizations that study workplace safety. The Internet also encompasses thousands of interactive sites where readers can ask and answer questions. Some sites, like Askville by Amazon.com, WikiAnswers, and Yahoo! Answers, are open to almost any topic. Others, like ParentingQuestions and WebMD, deal with specific topics. Chat rooms on bridal Web sites allow couples who are planning a wedding to share advice and compare prices for gowns, florists, caterers, and so on. Reader comment sites like Newsvine facilitate discussions about current events. Customer reviews are available for just about everything imaginable, from hotels and restaurants to personal care products, home improvement

Description	URL

products, and sports equipment. These contributors are not experts, nor do they pretend to be. Some may have extreme opinions that are not based in reality. Then, too, it is always possible for a vendor to "plant" favorable customer reviews on the Internet to make its product look good. Although the "terms of use," which contributors must agree to usually forbid the posting of advertisements, profanity, or personal attacks, some sites do a better job than others in monitoring and deleting such material. Nevertheless, if your speech research involves finding out how the "average person" feels about an issue in the news, or whether a new type of home exercise device really works as advertised, these comment and customer review sites can be very useful indeed.

It may seem like it's a hard work to assess your sources, to make sure your information is accurate and truthful, but the effort is worth it. Business and industry rely on reputation and trust, just as we individuals do, in order to maintain healthy relationships. Your speech is an important part of that reputation and interaction.

Compiling Your Information

When you have investigated and narrowed your topic, it's time to compile your information. Compiling involves composing your speech out of materials from the documents and other sources you have collected. This process has seven major steps, adapted from a model by Anderson, Anderson and Williams: sensitivity, exposure, assimilation and accommodation, incubation, incorporation, production and revision (Andrews, P., Andrews, J., and Williams, G., 1999).

Sensitivity refers to your capacity to respond to stimulation, be excited, be responsive, or be susceptible to new information. This starts with your self-inventory of what you are interested or involved in as you did in the first of the Note 10.1 "Introductory Exercises" for this chapter. If you are intrigued by a topic or area of interest, your enthusiasm will carry through to your speech and make it more stimulating for your audience. You may not have considered, or even noticed, elements or ideas associated with your topic, but now that you have begun the process of investigation, you see them everywhere. For example, have you ever heard someone say a word or phrase that you never heard before, but now that you are familiar with it, you hear it everywhere? This same principle applies to your sensitivity to ideas related to your topic. You'll notice information and it will help you as you develop your awareness of your topic and the many directions you could take the speech. Cognitive psychologist use the term "priming" to refer to this excited state of awareness (Yaniv, I., and Meyer, D., 1987).

Exposure involves your condition of being presented views, ideas, experiences, or made known to you through direct experience. If you are thinking of giving an informative speech on flying an airplane but have never flown before, your level of exposure may be low. Your level of awareness may be high, however, in terms of the importance of security on commercial airlines after reading about, watching on television, or hearing on the radio stories after the events of September 11, 2001. You may decide to expose yourself to more information through a range of sources as you investigate the topic of airline security. The more you become exposed to the issues, processes and goals of your topic, the more likely you are to see areas of interest, think of new ideas that might fit in your speech, and form patterns of awareness you did not perceive previously.

Description	URL
	Assimilation and accommodation refers to the process by which you integrate (assimilate) new ideas into your thinking patterns, and adopt (accommodate) or filter out new sources of information as they relate to your goal. You may have had preconceived notions or ideas about airline security before you began your investigation, but new information has changed the way you view your topic. You might also find issues (e.g., right to privacy) that may be points of conflict with your beliefs as you review information. This stage is important to the overall process of developing your topic and takes time. You need time to be able to contemplate, review, and reflect on how the new information fits or fails to connect clearly to your chosen topic. Incubation is the process by which you cause an idea or ideas to develop in your mind. This might not happen all at once, and you might spend time thinking about the new information, directions, or ways you might develop or focus your topic. Consider the meaning of the word "incubation" as it relates to chickens and eggs. An egg may look ready to hatch as soon as the hen lays it, but it needs time and a warm environment to develop. You might have an idea but need to create an environment for it to develop. This might involve further investigation and exploration, or it may involve removing yourself from active research to "digest" what you have already learned. If you feel "stuck" on an idea or perceive an inability to move on in the development of your ideas or topic, giving it a rest may be the best course of action. You may also find that just when you least expect it, an idea, fully formed, flashes into your mind and you ask yourself, "Why didn't I see that before?" Before the idea escapes you, write it down and make sure you can refer to it later. Incorporation refers to the process by which you bring the information into a whole or complete topic. By now you have investigated, chosen some information over others, and have started to see how the pieces will come together. Your perceptions of how the elements come together will form the basis for the organization of your speech. It will contribute to the logic of your message and help you produce a coherent, organized speech that your audience can follow clearly. Production involves the act of creating your speech from the elements you have gathered. You may start to consider what comes first, what goes last, and how you will link your ideas and examples together. You may find that you need additional information, and can go back to your notes that you taken to find the source quickly and easily. You may also start to communicate with friends, sharing some of the elements or even practicing the first drafts of your speech, learning where the connections are clear and where they need work. Revision is the process by which you look over your speech again in order to correct or improve it. You will notice elements that need further investigation, development, or additional examples and visual aids as your produce your speech. This is an important step to the overall production of your speech, much like revising an essay for an English course. The first time you said, thought, or wrote something it may have made sense to you, but upon reflection and after trying an idea out, you need it to be revised in order to work effectively as part of your speech. You may revisit the place in which you started, and start all speeches, by reconsidering the rhetorical situation and see if what you have produces is in line with the expectations of the audience. Your awareness of the content, audience, and purpose of the rhetorical situation will guide you

Description	URL
	through the revision process and contribute to the production of a more effective speech. **Key Takeaway** To find resources for your speech, narrow your topic and plan your search for information. Be aware of ethics, selecting reliable content, and avoiding plagiarism. Stay organized, and be a wise consumer of Internet information. Last, compile your information into a coherent series of main points. **Exercises** 1. Find at least one example of an Internet site that is sponsored by each of the following: ▪ Local, state, or federal government in the United States or another country ▪ For-profit corporation that sells a product or service to the general public ▪ Not-for-profit organization ▪ Private or public college, university, or other school 2. Describe the type of information available on each of your chosen sites. How do they differ from one another? What do they have in common? Discuss your findings with your classmates. 3. Find a Web site you find particularly useful in terms of information. Write a brief review and then share with classmates. 4. Find a Web site you find particularly poor in terms of your ability to access information. Write a brief review and then share with classmates. 5. When creating a speech, is it appropriate to omit certain information? Explain and discuss your thoughts with a classmate. 6. How can a persuasive speech be ethical? Explain your opinion and give some examples. Compare and share in class. **References** Andrews, P., Andrews, J., & Williams, G. (1999). *Public speaking: Connecting you and your audience*. Boston, MA: Houghton Mifflin Company. Paul, R., & Elder, L. (2007). *The miniature guide to critical thinking: Concepts and tools*. Dillon Beach, CA: The Foundation for Critical Thinking Press. Yaniv, I., & Meyer, D. (1987). Activation and metacognition of inaccesible stored information: Potential bases for incubation effects in problem loving. *Journal of Experimental Psychology Learning, Memory, and Cognition*, *13*, 187–205.

4.2.4: Myths and Realities of Public Speaking

Learning Objectives

1. Describe common myths and realities of public speaking.

Now that you have identified your purpose, chosen your topic and thesis statement, gathered and organized your material, you are almost ready to put your speech into its final form. At this juncture, let's examine some common public speaking myths and outline the guidelines you'll need to consider as you prepare to face your audience. There are a lot of myths associated with public speaking. In many ways these guidelines dispel common perceptions of public speaking and may lead you to be more open with yourself and your audience as you prepare and present your speech.

Speaking in Public is Not Like Killing Lions

From an evolutionary biology perspective, our bodies have developed to respond to stress in advantageous ways. When we needed to run from a bear, hunt a lion, or avoid a snake, our bodies predictably got us prepared with a surge of adrenaline (Burnham, T., and Phelan, J., 2000). Hunters who didn't respond well to stress or failed at hunting were less likely to live long enough to reach maturity and reproduce. So we have the successful hunter to thank for our genes, but people in developed countries today do not need hunting skills to feed their families.

While food is still an issue in many parts of the world, our need to respond to threats and stress has shifted from our evolutionary roots to concern over our job, our relationships, and how we negotiate a modern economy. Communication is a great resource and tool, and we can apply the principles and lessons to ourselves. We can create the perception that the speech is like defeating the lion and really get ourselves worked up. Or we can choose to see it as a natural extension of communication with others.

Speaking in public itself is not inherently stressful, but our response to the stimulus can contribute to or reduce our level of stress. We all will have a stress response to a new, unknown, or unfamiliar stimulus. Nevertheless, the butterflies in our stomach are a response we can choose to control by becoming more familiar with the expectations, preparation, and performance associated with speaking in public.

You Don't Have to Be Perfect

Letting go of perfection can be the hardest guideline to apply to ourselves. It's also in our nature to compare ourselves to others and ourselves. You might forgive a classmate for the occasional "umm" during a speech, but then turn right around and spend a lot of mental effort chastising yourself for making the same error in your presentation. We all have distinct strengths and weaknesses. Knowing yourself and where you need to improve is an important first step. Recognizing that Rome wasn't built in a day, and that you won't become a world-class speaker overnight, may be easier said than done.

It may help to recognize that your listeners don't want to see you fail; on the contrary, they want you to do well, because when you do, they will be able to relax and enjoy your presentation. You might be surprised to know that not everyone counts each time you say "umm." However, if "umm," "ahhh," or "you know what I mean" are phrases that you tend to repeat, they will distract your audience from your message. Eliminating such distracting habits can become a goal for improvement. Improvement is a process, not an end in itself; in fact, many people believe that learning to speak in public is more about the journey than the destination. Each new setting, context, and audience will present new challenges, and your ability to adapt, learned through your journey of experience, will help you successfully meet each new challenge.

Organization Is Key to Success

Have you ever thought of a great comeback to something someone said a while after they said it? Wouldn't it have been nice to be quick and articulate and able to deliver your comeback right then and there? Speaking in public gives you a distinct advantage over "off the cuff" improvisation and stumbling for the right comeback. You get to prepare and be organized. You know you'll be speaking to an audience in order to persuade them to do, think, or consider an idea or action.

What issues might they think of while you are speaking? What comebacks or arguments might they say if it were a debate? You get to anticipate what the audience will want to know, say, or hear. You get to prepare your statements and visual aids to support your speech and create the timing, organization, and presentation of each point. Many times in life we are asked to take a position and feel unprepared to respond. Speaking in public gives you the distinct opportunity to prepare and organize your ideas or points in order to make an impact and respond effectively.

Speaking in Public Is Like Participating in a Conversation

This may sound odd at first, but consider the idea of an "enlarged conversation" described by Julia T. Wood. She expresses a clear connection between everyday speech and public dialogue. Sometimes we take a speech turn, while at other times we remain silent while others take their turn. We do this all day long and think nothing of it. We are often the focus of attention from friends and colleagues and it hardly ever makes us nervous. When we get on a stage, however, some people perceive that the whole game has changed. It hasn't. We still take turns, and the speaker will take a longer turn as part of an enlarged conversation. People in the audience will still communicate feedback and the speaker will still negotiate his or her turn just the way they would in an everyday conversation. The difference is all about how we, as the speaker, perceive the context.

Some people feel that the level of expectations, the need for perfection, or the idealistic qualities we perceive in eloquent speakers are required, and then focus on deficiencies, fears, and the possibility of failing to measure up. By letting go of this ideal, we can approach the challenge with a more pragmatic frame of mind. The rules we play comfortably by in conversation every day are the same as we shift to a larger conversation within the context of public speaking. This viewpoint can offer an alternative as you address your apprehensions, and help you let go of unrealistic expectations.

Key Takeaway

Public speaking does not have to be a "fright or flight" experience; it can be like holding a half of a friendly conversation. This will especially be true if you do a good job of preparing and organizing your presentation ahead of time.

Exercises

1. Have you ever done a creative visualization exercise? Try this one and see how it helps you prepare your speech. Choose a quiet place, sit in a comfortable position, and close your eyes. Picture yourself getting up to give your oral presentation. Picture what you want to happen—you will speak confidently, clearly, and engagingly. Your audience will listen attentively and consider the merit of your points. When you are finished, they will applaud and express appreciation for the good job you have done.
2. Write out a series of goal statements, one for each part or point of your presentation. What do you want to accomplish with each section, visual aid, or statement? Share your results with classmates.
3. Consider the elements of a speech to inform and adapt them for a speech to persuade. In what ways would you adjust key points or issues?

References

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4.2.5: Overcoming Obstacles in Your Presentation

Learning Objectives

1. Overcome common obstacles in public speaking.

We have examined steps to help you investigate and build an effective speech, and discussed some myths, and realities, associated with public speaking. In order to prepare you for success, let's revisit some obstacles you'll want to avoid in order to make your content as accessible to your audience as possible. To build on what we covered, let's examine three key barriers to an effective speech: language, perception, and ethnocentrism. As a speaker, you will need to make an effort to consider each one and how you will create a bridge, rather than contribute to a barrier, with your audience.

Language

Language serves both to bring us together and to help us reinforce our group status. Language can include established languages, like Spanish or French; dialects; or even subtle in-group language styles within a larger language context. Have you ever been part of a group that has its own words or phrases, expressions that have meanings understood only by the members of your group? It is not unusual for families, groups of close friends, classmates, and romantic couples to develop these kinds of "private language." When a group communicates in its own way, it can create a sense of belonging, reinforcing your membership and place in that group.

People often tell each other stories, which often communicate a value or meaning in the culture. Perhaps you have heard the saying, "The early bird gets the worm," with its underlying meaning that the one who is prepared and ready gets the reward. In North America, this saying is common, and reflects a cultural value about promptness and competition. Diverse cultures have diverse sayings that reflect differences in values, customs, and traditions

Judy Pearson, Paul Nelson, and Joseph DeVito describe two key areas of language that serve to bring us together, but because they involve a specialized knowledge unique to the group or community, they can create barriers to outsiders. These are often called co-languages, because they exist and interact with a dominant language but are nonetheless distinct from it. Jargon is an occupation-specific language used by people in a given profession. Think of the way medical caregivers speak to one another, frequently using abbreviations for procedures and medications. Slang is the use of existing or newly invented words to take the place of standard or traditional words with the intent of adding an unconventional, nonstandard, humorous, or rebellious effect. Think of how the words "cool," "glitzy," or "scam" are used in casual conversation. In addition to language-based barriers, there are also several factors, many of which we have visited in previous chapters, which can act as barriers to effective intercultural communication.

Nature of Perception

Perception is an important part of the communication process, and it is important to recognize that other people's perceptions may be different from our own in several ways.

Your cultural value system, what you value and pay attention to, will significantly affect your speech and how your listeners perceive it. North American culture places an emphasis on space, with an "appropriate" distance while shaking hands, for example. If a North American travels to France, Spain, or Chile, he or she will find that a much smaller sense of personal space is the norm, and may receive a kiss on the cheek as a greeting from a new acquaintance. If the North American is uncomfortable, the person from France may not attribute his or her discomfort to personal space, and they may have a miscommunication. Learning about other cultures can help you adapt your speech in diverse settings, and make you more comfortable as you enter new situations where others' perceptions are different from your own.

Role identities, which involve expected social behavior, are another aspect of intercultural communication that can act as a barrier to effective communication. How does your culture expect men and women to act and behave? How about children, or elders, and older citizens? The word "role" implies an expectation of how one is supposed to act in certain settings and scenes; just like in a play or a movie, each person has a culturally bound set of role expectations. Who works as a doctor, a lawyer, a nurse, or a welder? As times and cultures change, so do role identities. Business management was once perceived as a profession dominated by men, but in recent decades women have become actively involved in starting, developing, and facilitating the growth of businesses. As a speaker, your role will necessarily involve preparation and practice, and to a degree an element of leadership as you present your content and guide your audience through it. Your audience also has a role, which involves active listening and displays of interest. Your overlapping roles of interest in the topic are keys to an effective speech.

Goals reflect what we value and are willing to work for and vary widely across cultures. In some cultures, an afternoon lunch is the main meal of the day, a time with the family, which is followed by a siesta or resting period. In the United States and northern Europe, people often have a quick lunch or even a "working lunch," with the emphasis on continuing productivity and the goal of personal and organizational achievement. The differences in values, such as family time versus work time, establish themselves in how we lead our lives. To a European who is accustomed to a full month of vacation each year, the thought of someone from the United States spending a few intense, three-day power weekends hiking, skiing, or sailing might seem stressful. To a goal-oriented North American, the power weekend may be just the rejuvenation required to get "back in the game." Time, and limits on it, will be an important goal in your speech.

Figure 4.2.5.3: In our diverse world, awareness of difference in values is key to success. Wikimedia Commons – public domain.

Geert Hofstede has spent decades researching the concepts of individualism versus collectivism across diverse cultures. He characterized U.S. culture as strongly individualistic: people perceive things primarily from their own viewpoint, see themselves as individuals capable of making his or her own decisions, and feel responsible for their actions and solving their own problems (Hofstede, G., 1982). He also found many countries in Asia and South America to be much more collectivistic, focusing on the needs of the family, community, or larger group. In this context, cultural background can become a barrier to an effective speech if your fail to consider your audience and their needs.

In addition, there are other cultural dimensions that influence how we relate to the world that impact our intercultural communication. Carley Dodd discusses the degree to which cultures communicate rules explicitly or implicitly (Dodd, C., 1998). In an explicit context, the rules are discussed before we hold a meeting, negotiate a contract, or even play a game. In the United States, we want to make sure everyone knows the rules beforehand and get frustrated if people do not follow the rules. In the Middle East and Latin America, the rules are generally understood by everyone, and people from these cultures tend to be more accommodating to small differences and are less concerned about whether or not everyone plays by the same rules. Our ability to adapt to contexts that are explicit or implicit is related to our ability to tolerate uncertainty (Hofstede G., 1982).

In the United States, we often look to guiding principles rather than rules for every circumstance, and believe that with hard work, we can achieve our goals even though we do not know the outcome. In Peru, Chile, and Argentina, however, people prefer to reduce ambiguity and uncertainty, and like to know exactly what is expected and what the probable outcome will be (Samovar, L., Porter, R., and Stefani, L., 1998).

Table 4.2.5.1: Cultural Dimensions

Individualistic Cultures. People value individual freedom and personal independence.	**Collectivistic Cultures**. People value the family or community over the needs of the individual.
Explicit-Rule Cultures. People discuss rules and expectations clearly to make sure the rules are known.	**Implicit-Rule Cultures**. People's customs are implied and known by everyone, but not always clearly stated.

Uncertainty-Accepting Cultures. People often focus on principles, rather than having rules for every circumstance, and accept that the outcome is not always known.	Uncertainty-Rejecting Cultures. People often focus on rules for every circumstance and do not like ambiguity or not knowing what the outcome will be.

When we consider whether a culture as a whole places more emphasis on the individual or the community, we must be careful to recognize that individual members of the culture may hold beliefs or customs that do not follow a cultural norm. Stereotypes, defined as generalizations about a group of people that oversimplify their culture (Rogers, E., and Steinfatt, T., 1999), can be one significant barrier to effective intercultural communication. Gordon Allport, a pioneer in the field of communication research, examined how and when we formulate or use stereotypes to characterize distinct groups or communities. He found that we tend to stereotype people and cultures with which we have little contact (Allport, G., 1958).

In addition, your first-hand experience will provide you with an increased understanding of prejudice. Prejudice involves a negative preconceived judgment or opinion that guides conduct or social behavior. Within the United States, can you make a list of people or groups that may be treated with prejudice by the majority group? Your list may include specific ethnic, racial, or cultural groups that are stereotyped in the media, but it could also include socioeconomic groups or even different regions of the United States. For example, Native Americans were long treated with prejudice in early Western films. Can you imagine, in other countries they may also treat groups with prejudice? In many parts of South America, indigenous people are treated poorly and their rights as citizens are sometimes not respected. Has treatment of Native Americans changed in North America? It has also changed, and continues to change in North and South America.

People who treat other with prejudice often make judgments about the group or communities. As Allport illustrated for us, we often assume characteristics about groups with which we have little contact. By extension, we can sometimes assume similarity that people are all basically similar, in effect denying cultural, racial, or ethnic differences. We sometimes describe the United States as a “melting pot,” where individual and cultural differences blend to become a homogeneous culture. This “melting pot” often denies cultural differences. The metaphor of a “salad bowl,” where communities and cultures retain their distinctive characteristics or “flavor,” serves as more equitable model. In this “salad bowl,” we value the differences and what they contribute to the whole.

We can also run the risk of assuming familiarity with cultures when we attribute characteristics of one group to everyone who has connections to the larger culture. For example, people may assume that we are familiar with all Native Americans if we know one tribe in our community, forgetting the distinct differences that exist between tribes and even between individual Native Americans who live either in urban areas or on reservations.

Ethnocentrism

Finally, your experience may help you to not view the world and its diversity of cultures in an ethnocentric way. Ethnocentrism means you go beyond pride in your culture, heritage or background and hold the “conviction that (you) know more and are better than those of different cultures” (Seiler, W., and Beall, M., 2000). This belief in the superiority of one’s own group can guide individual and group behavior. If you visit a new country where people do things differently, you would be considered ethnocentric if you viewed their way as wrong because it is not the same way you were taught. Groups are considered ethnocentric if they prejudge individuals or other groups of people based on negative preconceptions.

Key Takeaway

For a successful oral presentation, do your best to avoid obstacles to understanding, such as language expressions (i.e., unknown to other listeners), cultural perceptions, and ethnocentrism.

Exercises

1. Consider the vocabulary that you and your classmates generally use in casual conversations. Are there slang expressions that you often use? Is there a jargon related to your career or major field of study? Make a list of slang and jargon words that you might want to use in a speech. Now, consider whether you can substitute standard English words that will be better understood by all your listeners, remembering that in a business context it is often best to avoid slang and jargon.
2. Pretend you were going to invite someone from a completely different culture to come home with you for a break or holiday. Make a list of ideas, words, or places you would want to share with them to gain insight of you, your family, or your community.
3. How can a speaker prepare a speech for a diverse audience? Explain and give some specific examples. Discuss your thoughts with a classmate.

4. Observe someone presenting a speech. Given the discussion in this chapter, what elements of their speech could you use in your speech? What elements would you not want to use? Why? Compare with a classmate.

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4.2.6: Additional Resources

Oral communication skill is key to success in politics. Visit the C-SPAN Web site to watch and listen to speeches, interviews, and other public speaking events. http://www.c-span.org/

Schooltube.com offers a video archive of student government speeches. http://www.schooltube.com/

The Nation's Forum Collection of the Library of Congress consists of recordings of dozens of speeches from the period 1918 to 1920. http://memory.loc.gov/ammem/nfhtml

The Copyright Office of the Library of Congress offers a wide variety of resources for understanding copyright law and how to avoid plagiarism. http://www.copyright.gov

Thunderbird School of Global Management operates Thunderbird Knowledge Network, an interactive forum on contemporary business issues delivered in stories, columns, videos, podcasts, and blogs. http://knowledgenetwork.thunderbird.edu/research

The U.S. Department of Labor's Occupational Safety and Health Administration (OSHA) sets the standards and conducts inspections to ensure safety and prevent accidents in the workplace. www.osha.gov

Watch an informative speech on "Avoiding Stereotypes in Public Speaking." https://www.youtube.com/watch?v=Jbcr23KerV4

SECTION OVERVIEW

4.3: Presentations to Inform

Informative presentations focus on helping the audience to understand a topic, issue, or technique more clearly. You might say, "Is that all?" and the answer is both yes and no. An affirmative response underscores the idea that informative speeches do not seek to motivate the audience to change their minds, adopt a new idea, start a new habit, or get out there and vote. They may, however, inform audiences on issues that may be under consideration in an election or referendum. On the other hand, a negative response reaffirms the idea that to communicate a topic, issue, or subject clearly is a challenge in itself and shouldn't be viewed as a simplistic process.

Thumbnail: pixabay.com/photos/analyzing...rming-3441040/

4.3.1: Functions of the Presentation to Inform

Learning Objectives

1. Describe the functions of the speech to inform.
2. Explain the difference between exposition and interpretation.

There are distinct functions inherent in a speech to inform, and you may choose to use one or more of these functions in your speech. Let's take a look at the functions and see how they relate to the central objective of facilitating audience understanding.

Share

The basic definition of communication highlights the process of understanding and sharing meaning. An informative speech follows this definition in the aspect of sharing content and information with an audience. You won't be asking the audience to actually do anything in terms of offering a response or solving a problem. Instead you'll be offering to share with the audience some of the information you have gathered relating to a topic. This act of sharing will reduce ignorance, increase learning, and facilitate understanding of your chosen topic.

Increase Understanding

How well does your audience grasp the information? This should be a guiding question to you on two levels. The first involves what they already know—or don't know—about your topic, and what key terms or ideas might be necessary for someone completely unfamiliar with your topic to grasp the ideas you are presenting. The second involves your presentation and the illustration of ideas. A bar chart, a pie graph, and a video clip may all serve you and the audience well, but how will each ingredient in your speech contribute to their understanding? The audience will respond to your attention statement and hopefully maintain interest, but how will you take your speech beyond superficial coverage of content and effectively communicate key relationships that increase understanding? These questions should serve as a challenge for your informative speech, and by looking at your speech from an audience-oriented perspective, you will increase your ability to increase the audience's understanding.

Change Perceptions

How you perceive stimuli has everything to do with a range of factors that are unique to you. We all want to make sense of our world, share our experiences, and learn that many people face the same challenges we do. Many people perceive the process of speaking in public as a significant challenge, and in this text, we have broken down the process into several manageable steps. In so doing, we have to some degree changed your perception of public speaking. When you present your speech to inform, you may want to change the audience member's perceptions of your topic. You may present an informative speech on air pollution and want to change common perceptions such as the idea that most of North America's air pollution comes from private cars, or that nuclear power plants are a major source of air pollution. You won't be asking people to go out and vote, or change their choice of automobiles, but you will help your audience change their perceptions of your topic.

Gain Skills

Just as you want to increase the audience's understanding, you may want to help the audience members gain skills. If you are presenting a speech on how to make salsa from fresh ingredients, your audience may thank you for not only the knowledge of the key ingredients and their preparation but also the product available at the conclusion. If your audience members have never made their own salsa, they may gain a new skill from your speech. In the same way, perhaps you decide to inform your audience about eBay, a person-to-person marketplace much like a garage sale in which items are auctioned or available for purchase over the Internet. You may project onto a screen in class the main Web site and take the audience through a step-by-step process on how to sell an item. The audience may learn an important skill, clean out the old items in their garage, and buy new things for the house with their newfound skills. Your intentions, of course, are not to argue that salsa is better than ketchup or that eBay is better than Amazon, but to inform the audience, increasing their understanding of the subject, and in this case, gaining new skills.

Exposition versus Interpretation

When we share information informally, we often provide our own perspective and attitude for our own reasons. But when we set out to inform an audience, taking sides or using sarcasm to communicate attitude may divide the audience into groups that agree or disagree with the speaker. The speech to inform the audience on a topic, idea, or area of content is not intended to be a display of attitude and opinion. Consider the expectations of people who attend a formal dinner. Will they use whatever fork or spoon they want, or are there expectations of protocol and decorum? In any given communication context there are expectations, both implicit and explicit. If you attend a rally on campus for health care reform, you may expect the speaker to motivate you to urge the university to stop investing in pharmaceutical companies, for example. On the other hand, if you enroll in a biochemistry course, you expect a teacher to inform you about the discipline of biochemistry—not to convince you that pharmaceutical companies are a good or bad influence on our health care system.

The speech to inform is like the classroom setting in that the goal is to inform, not to persuade, entertain, display attitude, or create comedy. If you have analyzed your audience, you'll be better prepared to develop appropriate ways to gain their attention and inform them on your topic. You want to communicate thoughts, ideas, and relationships and allow each listener specifically, and the audience generally, to draw their own conclusions. The speech to inform is all about sharing information to meet the audience's needs, not your own. While you might want to inform them about your views on politics in the Middle East, you'll need to consider what they are here to learn from you and let your audience-oriented perspective guide you as you prepare.

Exposition

This relationship between informing as opposed to persuading your audience is often expressed in terms of exposition versus interpretation. Exposition means a public exhibition or display, often expressing a complex topic in a way that makes the relationships and content clear. Expository prose is writing to inform; you may have been asked to write an expository essay in an English course or an expository report in a journalism course. The goal is to communicate the topic and content to your audience in ways that illustrate, explain, and reinforce the overall content to make your topic more accessible to the audience. The audience wants to learn about your topic and may have some knowledge on it as you do. It is your responsibility to consider ways to display the information effectively.

Interpretation and Bias

Interpretation involves adapting the information to communicate a message, perspective, or agenda. Your insights and attitudes will guide your selection of material, what you focus on, and what you delete (choosing what not to present to the audience). Your interpretation will involve personal bias. Bias is an unreasoned or not-well-thought-out judgment. Bias involves beliefs or ideas held on the basis of conviction rather than current evidence. Beliefs are often called "habits of the mind" because we come to rely on them to make decisions. Which is the better, cheapest, most expensive, or the middle-priced product? People often choose the middle-priced product and use the belief "if it costs more it must be better" (and the opposite: "if it is cheap it must not be very good"). The middle-priced item, regardless of actual price, is often perceived as "good enough." All these perceptions are based on beliefs, and they may not apply to the given decision or even be based on any evidence or rational thinking.

By extension, marketing students learn to facilitate the customer "relationship" with the brand. If you come to believe a brand stands for excellence, and a new product comes out under that brand label, you are more likely to choose it over an unknown or lesser-known competitor. Again, your choice of the new product is based on a belief rather than evidence or rational thinking. We take mental shortcuts all day long, but in our speech to inform, we have to be careful not to reinforce bias.

Bias is like a filter on your perceptions, thoughts, and ideas. Bias encourages you to accept positive evidence that supports your existing beliefs (regardless of whether they are true) and reject negative evidence that does not support your beliefs. Furthermore, bias makes you likely to reject positive support for opposing beliefs and accept negative evidence (again, regardless of whether the evidence is true). So what is positive and what is negative? In a biased frame of mind, that which supports your existing beliefs is positive and likely to be accepted, while that which challenges your beliefs is likely to be viewed as negative and rejected. There is the clear danger in bias. You are inclined to tune out or ignore information, regardless of how valuable, useful, or relevant it may be, simply because it doesn't agree with or support what you already believe.

Point of View

Let's say you are going to present an informative speech on a controversial topic like same-sex marriage. Without advocating or condemning same-sex marriage, you could inform your audience about current laws in various states, recent and proposed changes in laws, the number of same-sex couples who have gotten married in various places, the implications of being married or not being able to marry, and so on. But as you prepare and research your topic, do you only read or examine information that supports your existing view? If you only choose to present information that agrees with your prior view, you've incorporated bias into your speech. Now let's say the audience members have different points of view, even biased ones, and as you present your information you see many people start to fidget in their seats. You can probably anticipate that if they were to speak, the first word they would say is “but” and then present their question or assertion. In effect, they will be having a debate with themselves and hardly listening to you.

You can anticipate the effects of bias and mitigate them to some degree. First, know the difference between your point of view or perspective and your bias. Your point of view is your perception of an idea or concept from your previous experience and understanding. It is unique to you and is influenced by your experiences and also factors like gender, race, ethnicity, physical characteristics, and social class. Everyone has a point of view, as hard as they may try to be open-minded. But bias, as we’ve discussed previously, involves actively selecting information that supports or agrees with your current belief and takes away from any competing belief. To make sure you are not presenting a biased speech, frame your discussion to inform from a neutral stance and consider alternative points of view to present, compare and contrast, and diversify your speech. The goal of the speech to inform is to present an expository speech that reduces or tries to be free from overt interpretation.

This relates to our previous discussion on changing perceptions. Clearly no one can be completely objective and remove themselves from their own perceptual process. People are not modern works of minimalist art, where form and function are paramount and the artist is completely removed from the expression. People express themselves and naturally relate what is happening now to what has happened to them in the past. You are your own artist, but you also control your creations.

Objectivity involves expressions and perceptions of facts that are free from distortion by your prejudices, bias, feelings or interpretations. For example, is the post office box blue? An objective response would be yes or no, but a subjective response might sound like “Well, it’s not really blue as much as it is navy, even a bit of purple, kind of like the color of my ex-boyfriend’s car, remember? I don’t care for the color myself.” Subjectivity involves expressions or perceptions that are modified, altered, or impacted by your personal bias, experiences, and background. In an informative speech, your audience will expect you to present the information in a relatively objective form. The speech should meet the audience’s need as they learn about the content, not your feelings, attitudes, or commentary on the content.

Here are five suggestions to help you present a neutral speech:

1. Keep your language neutral and not very positive for some issues while very negative for others.
2. Keep your sources credible and not from biased organizations. The National Rifle Association (NRA) will have a biased view of the Second Amendment, for example, as will the American Civil Liberties Union (ACLU) on civil rights.
3. Keep your presentation balanced. If you use a source that supports one clear side of an issue, include an alternative source and view. Give each equal time and respectful consideration.
4. Keep your audience in mind. Not everyone will agree with every point or source of evidence, but diversity in your speech will have more to offer everyone.
5. Keep who you represent in mind: Your business and yourself.

Key Takeaways

- The purpose of an informative speech is to share ideas with the audience, increase their understanding, change their perceptions, or help them gain new skills.
- An informative speech incorporates the speaker’s point of view but not attitude or interpretation.

Exercises

1. Consider the courses you have taken in the past year or two, and the extent to which each class session involved an informative presentation or one that was more persuasive. Do some disciplines lend themselves more to informing rather than interpretation and attitude? Discuss your findings with your classmates.
2. Visit a major network news Web site and view a video of a commentator such as Rachel Maddow or Keith Olbermann (MSNBC) or Glenn Beck or Bill O’Reilly (Fox News). Identify the commentator’s point of view. If you were giving a presentation to inform, would you express your point of view in a similar style?
3. On the same network news Web site you used for Exercise no. 2, view a video reporting a news event (as opposed to a commentator’s commentary). Do you feel that the reporter’s approach conveys a point of view, or is it neutral? Explain your feelings and discuss with your classmates.
4. What is the difference between an informative presentation and a persuasive one? Provide an example in your response.
5. Consider a sample speech to inform on a topic where you have a strong opinion. In what ways would you adjust your key points so as not to persuade your listeners? Discuss your ideas with a classmate.

4.3.2: Types of Presentations to Inform

Learning Objectives

1. Provide examples of four main types of speech to inform.

Speaking to inform may fall into one of several categories. The presentation to inform may be

- an explanation,
- a report,
- a description, or
- a demonstration of how to do something.

Let's explore each of these types of informative speech.

Explanation

Have you ever listened to a lecture or speech where you just didn't get it? It wasn't that you weren't interested, at least not at first. Perhaps the professor used language and jargon, or gave a confusing example, or omitted something that would have linked facts or concepts together. Soon you probably lost interest and sat there, attending the speech or lecture in body but certainly not in mind. An effective speech to inform will take a complex topic or issue and *explain* it to the audience in ways that increase audience understanding. Perhaps the speech where you felt lost lacked definitions upfront, or a clear foundation in the introduction. You certainly didn't learn much, and that's exactly what you want to avoid when you address your audience. Consider how you felt and then find ways to explain your topic—visually, using definitions and examples, providing a case study—that can lay a foundation on common ground with your audience and build on it.

No one likes to feel left out. As the speaker, it's your responsibility to ensure that this doesn't happen. Also know that to teach someone something new—perhaps a skill that they did not posses or a perspective that allows them to see new connections—is a real gift, both to you and the audience members. You will feel rewarded because you made a difference and they will perceive the gain in their own understanding.

Report

As a business communicator, you may be called upon to give an informative report where you communicate status, trends, or relationships that pertain to a specific topic. You might have only a few moments to speak, and you may have to prepare within a tight time frame. Your listeners may want "just the highlights," only to ask pointed questions that require significant depth and preparation on your part. The informative report is a speech where you organize your information around key events, discoveries, or technical data and provide context and illustration for your audience. They may naturally wonder, "Why are sales up (or down)?" or "What is the product leader in your lineup?" and you need to anticipate their perspective and present the key information that relates to your topic. If everyone in the room knows the product line, you may not need much information about your best seller, but instead place emphasis on marketing research that seems to indicate why it is the best seller.

Perhaps you are asked to be the scout and examine a new market, developing strategies to penetrate it. You'll need to orient your audience and provide key information about the market and demonstrate leadership as you articulate your strategies. You have a perspective gained by time and research, and your audience wants to know why you see things the way you do, as well as learn what you learned. A status report may be short or long, and may be an update that requires little background, but always consider the audience and what common ground you are building your speech on.

Description

Have you ever listened to a friend tell you about their recent trip somewhere and found the details fascinating, making you want to travel there or visit a similar place? Or perhaps you listened to your chemistry teacher describe a chemical reaction you were going to perform in class and you understood the process and could reasonably anticipate the outcome. Describing information requires emphasis on language that is vivid, captures attention, and excites the imagination. Your audience will be drawn to your effective use of color, descriptive language, and visual aids. An informative speech that focuses description will be visual in many ways. You may choose to illustrate with images, video and audio clips, and maps. Your first-person experience combined with your content will allow the audience to come to know a topic, area, or place through you, or secondhand. Their imagination is your ally, and you should aim to stimulate it with attention-getting devices and clear visual aids. Use your imagination to place yourself in their perspective: how would you like to have someone describe the topic to you?

Demonstration

You want to teach the audience how to throw a fast pitch in softball or a curveball in baseball. You want to demonstrate how to make salsa or how to program the applications on a smartphone. Each of these topics will call on your kindergarten experience of "show and tell." A demonstrative speech focuses on clearly showing a process and telling the audience important details about each step so that they can imitate, repeat, or do the action themselves. If the topic is complicated, think of ways to simplify each step.

Consider the visual aids or supplies you will need. You may have noticed that cooking shows on television rarely show the chef chopping and measuring ingredients during the demonstration. Instead, the ingredients are chopped and measured ahead of time and the chef simply adds each item to the dish with a brief comment like, "Now we'll stir in half a cup of chicken stock." If you want to present a demonstration speech on the ways to make a paper airplane, one that will turn left or right, go up, down or in loops, consider how best to present your topic. Perhaps by illustrating the process of making one airplane followed by example on how to make adjustments to the plane to allow for different flight patterns would be effective. Would you need additional paper airplanes made in advance of your speech? Would an example of the paper airplane in each of the key stages of production be helpful to have ready before the speech? Having all your preparation done ahead of time can make a world of difference, and your audience will appreciate your thoughtful approach.

By considering each step and focusing on how to simplify it, you can understand how the audience might grasp the new information and how you can best help them. Also, consider the desired outcome; for example, will your listeners be able to actually do the task themselves or will they gain an appreciation of the complexities of a difficult skill like piloting an airplane to a safe landing? Regardless of the sequence or pattern you will illustrate or demonstrate, consider how people from your anticipated audience will respond, and budget additional time for repetition and clarification.

Informative presentations come in all sizes, shapes, and forms. You may need to create an "elevator speech" style presentation with the emphasis on brevity, or produce a comprehensive summary of several points that require multiple visual aids to communicate complex processes or trends. The main goal in an informative presentation is to inform, not to persuade, and that requires an emphasis on credibility, for the speaker and the data or information presented. Extra attention to sources is required and you'll need to indicate what reports, texts, or Web sites were sources for your analysis and conclusions.

Here are additional, more specific types of informative presentations:

- Biographical information
- Case study results
- Comparative advantage results
- Cost-benefit analysis results
- Feasibility studies
- Field study results
- Financial trends analysis
- Health, safety, and accident rates
- Instruction guidelines
- Laboratory results
- Product or service orientations
- Progress reports
- Research results
- Technical specifications

Depending on the rhetorical situation, the audience, and the specific information to be presented, any of these types of presentation may be given as an explanation, a report, a description, or a demonstration.

Key Takeaway

An informative speech may explain, report, describe, or demonstrate how to do something.

Exercises

1. Watch a "how-to" television show, such as one about cooking, home improvement, dog training, or crime solving. What informative techniques and visual aids are used in the show to help viewers learn the skills that are being demonstrated?
2. Prepare a simple "how-to" presentation for the class. Present and compare your results.
3. Compare and contrast two television programs, noting how each communicates the meaning via visual communication rather than words or dialogue. Share and compare with classmates.

4.3.3: Adapting Your Presentation to Teach

Learning Objectives

1. Articulate and demonstrate an audience-centered perspective.
2. Provide and demonstrate examples of ways to facilitate active listening.

Successfully delivering an informative speech requires adopting an audience-centered perspective. Imagine that you are in the audience. What would it take for the speaker to capture and maintain your attention? What would encourage you to listen? In this section we present several techniques for achieving this, including motivating your audience to listen, framing your information in meaningful ways, and designing your presentation to appeal to diverse learning styles.

Motivating the Listener

In an ideal world, every audience member would be interested in your topic. Unfortunately, however, not everyone will be equally interested in your informative speech. The range of interest might extend from not at all interested to very interested, with individual audience members all across this continuum. So what is a speaker to do in order to motivate the listener?

The perception process involves selection or choice, and you want your audience to choose to listen to you. You can have all the "bells and whistles" of a dramatic, entertaining or engaging speech and still not capture everyone's attention. You can, however, use what you know to increase their chances of paying attention to you. Begin with your attention statement at the beginning of your speech and make sure it is dynamic and arresting. Remember what active listening involves, and look for opportunities throughout your speech to encourage active listening.

Let's highlight seven strategies by posing questions that audience members may think, but not actually say out loud, when deciding whether to listen to your speech. By considering each question, you will take a more audience-centered approach to developing your speech, increasing your effectiveness.

How Is Your Topic Relevant to Me?

A natural question audience members will ask themselves is, what does the topic have to do with me? Why should I care about it? Your first response might be because it's your turn to speak, so the least they can do is be respectful. Instead, consider the idea that you can lead a horse to water but you can't make her drink. If you are in a class, the audience is part of the class and they may be present in body, but they may arrive wishing they were somewhere else. You can put a stop to that wish by making your topic relevant for your audience. Relevance means that the information applies, relates, or has significance to the listener. Find areas of common ground and build on them.

If you are going to present an informative speech about the drinking and driving laws in your state, you can be assured that many people in the audience drive automobiles, some may consume alcohol, and according to psychologist Abraham Maslow, everyone needs safety. You may also consider that some of your listeners have had experiences with people who have consumed too much alcohol or people who have driven under the influence; they may have even had a loved one injured by an intoxicated driver. You may use the issue of safety to underscore relevance. You might consider briefly alluding to the effects of alcohol, asking rhetorically if audience members have ever seen someone try to walk, talk, or even drive after a drinking binge. All these strategies will reinforce the relevance of your topic and highlight connections across common ground.

What Will I Learn from You?

This question involves several issues. How much does the audience already know about your subject? What areas do you think they might not know? If you know that many people are aware of the laws in your state that pertain to intoxicated driving, you may consider informing them about proposed changes to these laws in your state legislature. Another approach might be to describe the impact of the laws on families and individuals. The consequences can be discussed in terms of annual statistics of motor vehicle accidents involving alcohol, the age and gender distribution of those involved, and the individual consequences in terms of financial penalties, impact on employment, and a criminal record. By building on the information the audience knows, briefly reviewing it and then extending it, illustrating it, and demonstrating the impact, you inform them of things they didn't already know.

Why Are You Interested in This Topic?

Your interest in your topic is an excellent way to encourage your audience to listen. Interest involves qualities that arouse attention, stimulate curiosity, or move an individual to a more excited state of mind. You probably selected your topic with your audience in mind, but also considered your interest in the topic. Why did you choose it over other topics? What about your topic aroused your attention? Did it stimulate your curiosity? Did it make you excited about researching and preparing a speech on it? These questions will help you clarify your interest, and by sharing the answers with your listeners, you will stimulate excitement on their part.

How Can I Use the Knowledge or Skills You Present to Me?

In an informative speech you are not asking your listeners to go out and vote, or to quit smoking tomorrow, as you would in a persuasive speech. Nevertheless, you need to consider how they will apply their new understanding. Application involves the individual's capacity for practical use of the information, skill, or knowledge. As a result of your speech, will your listeners be able to do something new like set up an auction on eBay? Will they better understand the importance of saving money and know three new ways to save for retirement?

For example, as a result of your informative speech on drunk driving laws, they may reflect on what a conviction would mean to them financially, think about how they would get to work if their driver's license was suspended, or imagine the grief of a family when an innocent person is killed in a drunk driving accident. Although your goal is not to persuade but inform, the new knowledge gained by your audience may motivate them to make new decisions about their lives.

When you prepare your presentation, consider ways you can actively show application of your material or content. Incorporate messages into your speech to highlight the practical use of the knowledge or skill. A couple of helpful comments about how the audience will actually use the information will go a long way toward encouraging listening and gaining attention.

What Is New about What You Propose to Present?

Sometimes humans seem like a mass of contradictions. We are naturally attracted to novelty, yet we appreciate predictability. We like clear organization, yet there are times when we enjoy a little controlled chaos. Novelty involves something new, unusual, or unfamiliar. As a speaker, how do you meet the two contrasting needs for familiarity and novelty?

Address both. You may want to start by forming a clear foundation on what you have in common with the audience. Present the known elements of your topic and then extend into areas where less is known, increasing the novelty or new information as you progress. People will feel comfortable with the familiar, and be intrigued by the unfamiliar.

You might also invert this process, starting from a relatively unfamiliar stance and working your way back to the familiar. This is a technique often used in cinema, where the opening shot is an extreme close-up of something and you can't guess what it is for lack of perspective. As the camera pulls back or pans left or right, you get more clues and eventually are able to see what it is. It is intriguing, yet familiar. Consider ways to reinforce the novelty of your material to your audience to encourage listening.

Are You Going to Bore Me?

You have probably sat through your fair share of boring lectures where the speaker, teacher, or professor talks at length in a relatively monotone voice, fails to alternate his or her pace, incorporates few visual aids or just reads from a PowerPoint show for an hour in a dimly lighted room. Recall how you felt. Trapped? Tired? Did you wonder why you had to be there? Then you know what you need to avoid.

Being bored means the speaker failed to stimulate you as the listener, probably increased your resistance to listening or participating, and became tiresome. To avoid boring your audience, speak with enthusiasm, and consider ways to gain, and keep gaining, their attention. You don't have to be a standup comedian, however, to avoid being a boring speaker. Consider the rhetorical situation, and let the audience's needs guide you as you prepare. Adjust and adapt as they give you feedback, nonverbal or verbal. Consider the question, "What's in it for me?" from the audience's perspective and plan to answer it specifically with vivid examples. If your presentation meets their expectations and meets their needs, listeners are more likely to give you their attention.

Figure 4.3.3.1: If your presentation meets their expectations and meets their needs, listeners are more likely to give you their attention. Michael Coghlan – Attentive – CC BY-SA 2.0.

You may also give some thought and consideration to the organizational principle and choose a strategy that promises success. By organizing the information in interesting ways within the time frame, you can increase your effectiveness. The opposite of boring is not necessarily entertaining. Variety in your speech, from your voice to your visual aids, will help stimulate interest.

Is This Topic Really as Important as You Say It Is?

No one wants to feel like his or her time is being wasted. That trapped, tired, or bored feeling is often related to a perception that the topic is not relevant or important. What is important to you and what is important to your audience may be two different things. Take time and plan to reinforce in your speech how the topic is important to your audience. Importance involves perceptions of worth, value, and usefulness.

How can you express that the topic is worthy of their attention? We've discussed the importance of considering why you chose the topic in the first place as a strategy to engage your audience. They will want to know why the topic was worthy of your time, and by extension, their time.

Consider how to express through images, examples, or statistics the depth, breadth, and impact of your topic. Tell the audience how many drivers under the age of twenty-one lose their lives each year in alcohol-related accidents, or what percentage of all under-twenty-one deaths in your state are related to a combination of drinking and driving. Remember, too, that because statistics may sound impersonal or overwhelming, focusing on a specific case may provide more depth. As a final tip, be careful not to exaggerate the importance of your topic, as you may run the risk of having the audience mentally call your bluff. If this happens, you will lose some credibility and attention.

Framing

The presentation of information shapes attitudes and behavior. This is done through framing and content. Framing involves placing an imaginary set of boundaries, much like a frame around a picture or a window, around a story, of what is included and omitted, influencing the story itself. What lies within the frame that we can see? What lies outside the frame that we cannot see? Which way does the window face? All these variables impact our perspective, and by the acts of gatekeeping and agenda setting, the media frames the stories we see and information we learn.

Suppose you are presenting an informative speech about media effects on viewers. You might cite the case of the 1993 movie *The Program* about college football players (James, C., 1993). In one scene, to demonstrate their "courage," the football players lie on the divider line of a busy highway at night as cars rush past. After viewing the film, several teenagers imitated the scene; some were seriously injured and one died as a result (Wilson, J. and Wilson, S., 1998). How will you frame this incident in the context of your speech? You might mention that the production studio subsequently deleted the highway sequence from the film, that the sequence clearly indicated the actors were stunt men, or that *The Program* ultimately argues that such behavior is destructive and unwarranted. Or you might cite additional incidents where people have been injured or killed by trying a stunt they saw in the media.

One form of framing is gatekeeping. Gatekeeping, according to Pearson and Nelson, is “a process of determining what news, information, or entertainment will reach a mass audience” (Pearson, J. and Nelson, P., 2000). The term “gatekeeping” was originally used by psychologist Kurt Lewin as a metaphor, featuring a series of gates that information must pass through before ever reaching the audience (Wilson, J. and Wilson, S., 1998). In the context of journalism and mass media, gates and gatekeepers may include media owners, editors, or even the individual reporter in the context of mass communication. In the context of public speaking, you as the speaker are the gatekeeper to the information.

Another function of gatekeeping is agenda setting. Setting the agenda, just like the agenda of a meeting, means selecting what the audience will see and hear and in what order. Who decides what is the number one story on the evening news? Throughout the twentieth century, professional communicators working in the media industry set the agenda for readers, listeners, and viewers; today widespread Internet access has greatly broadened the number of people who can become agenda setters. In giving a speech, you select the information and set the agenda. You may choose to inform the audience on a topic that gets little press coverage, or use a popular story widely covered in a new way, with a case example and local statistics.

Another aspect of framing your message is culture. According to Pearson and Nelson, culture within the context of communication is “a set of beliefs and understandings a society has about the world, its place in it, and the various activities used to celebrate and reinforce those beliefs” (Pearson, J. and Nelson, P., 2000). Themes of independence, overcoming challenging circumstances, and hard-fought victory are seen repeatedly in American programming and national speeches. They reflect an aspect of American culture. In the case of football, it is sometimes viewed as the quintessentially male American sport, and its importance on Thanksgiving Day is nothing short of a ritual for many Americans. If you went to a country in Latin America, you would probably find the television set tuned to a soccer game, where soccer is the revered sport. What do these sports say about culture?

Figure 4.3.3.2: Cultural values are expressed through interaction, including sports. Celso FLORES – Mexico – South Africa Match at Soccer City – CC BY 2.0.

One might argue that American football is aggressive and that, while the team is important, the individual’s effort and record are celebrated in all the time between plays. Significant attention is given to the salary each individual player makes. In South American football, or soccer, the announcer’s emphasis is on the team and at breaks, some discussion of key players is present, but not to the same degree, though this is changing.

What do these differences tell us? Our interpretation of these differences may point toward ways in which the media reinforces national culture and its values. However, since you are speaking to inform, take care not to overgeneralize. To state that American football is a male-viewer-dominated sport may be an accurate observation, but to exclude women when discussing the sport would lead to a generalization that is not accurate, and may even perpetuate a stereotype.

The media and its public communication is an active participant in the perpetuation of stereotypes in many ways. In the mid-1990s, Julia Wood made an interesting observation of the world according to television: “It is a world in which males make up two-thirds of the population. The women are fewer in number perhaps because less than 10 percent live beyond 35. Those who do, like their male counterparts and the younger females, are nearly all white and heterosexual. In addition to being young, the majority of women are beautiful, very thin, passive, and primarily concerned with relationships and getting rings out of collars and commodes" (Pearson, J. and Nelson, P., 2000).

This limited view, itself a product of gatekeeping, agenda setting, and the profit motive, has little connection to the "real world." Most people in the world are not white, and the majority of U.S. adults are either overweight or obese. There are more women than men in the adult populations of most countries. Women do not tend to die off at age thirty-five, in fact women on average live longer than men. Many people, particularly in a diverse country that is undergoing dramatic demographic changes, are not members of just one racial, ethnic, or cultural group but rather a member of many groups. Consider culture when selecting content and note that diversity of information and sources will strengthen your speech and relate to more members of your audience.

Additional Tips

Andrews, Andrews, and Williams offer eight ways to help listeners learn that are adapted and augmented here.

Limit the Number of Details

While it may be tempting to include many of the facts you've found in your research, choose only those that clearly inform your audience. Try to group the information and then choose the best example to reduce your list of details. You don't want the audience focusing on a long list of facts and details only to miss your main points.

Focus on Clear Main Points

Your audience should be able to discern your main points clearly the first time. You'll outline them in your introduction and they will listen for them as you proceed. Connect supporting information to your clear main points to reinforce them, and provide verbal cues of points covered and points to come.

Use internal summaries, where you state, "Now that we've discussed X point, let's examine its relationship to Y point. This will help your audience follow your logic and organization and differentiate between supporting material and main points. You may also want to foreshadow points by stating, "We'll examine Z point in a moment but first let's consider Y point."

Pace Yourself Carefully

Talking too fast is a common expression of speech anxiety. One way to reduce your anxiety level is to practice and know your information well. As you practice, note where you are in terms of time at the completion of each point. After a few practice rounds, you should begin to see some consistency in your speed. Use these benchmarks of time to pace yourself. When you deliver your speech, knowing you have time, are well prepared, and are familiar with your speech patterns will help you to pace yourself more effectively.

Speak with Concern for Clarity

Not everyone speaks English as his or her first language, and even among English speakers, there is a wide discrepancy in speaking style and language use. When you choose your language, consider challenging terms and jargon, and define them accordingly. You may assume that everyone knows "NIH" stands for "National Institutes of Health," but make sure you explain the acronym the first time you use it, just as you would if you were writing a formal article. Also pay attention to enunciation and articulation. As your rate of speech picks up, you may tend to slur words together and drop or de-emphasize consonants, especially at the ends of words. Doing this will make you harder to understand, discouraging listening.

Use Restatement and Repetition

There is nothing wrong with restating main points or repeating key phrases. The landmark speech titled "I have a dream," which Martin Luther King Jr. delivered on August 28, 1963, on the steps of the Lincoln Memorial, used that phrase multiple times to reinforce the main message effectively.

Provide Visual Reinforcement

We've discussed the importance of visual aids to support and illustrate your content. As a speaker giving a prepared presentation, you have the luxury of preparing your visual aids with your audience in mind. In an impromptu speech, or a media interview, you may lack this luxury and find the effort challenging to appropriately reinforce your content. Take advantage of the known time frame before your speech to prepare effective visual aids and your speech will be more effective.

Include Time for Questions

You can't possibly cover all the information about a topic that every audience member would want to know in the normal five to seven minutes of a speech. You may do an excellent job of supporting and reinforcing your points, but many listeners may have questions. Take this as a compliment—after all, if you hadn't piqued their interest, they wouldn't have any questions to ask. Answering questions is an opportunity to elaborate on a point, reinforcing what you presented and relying on your thorough preparation to illustrate the point with more depth.

In some situations, the speaker will accept and answer questions during the body of the presentations, but it is more typical to ask listeners to hold their questions until the end. Depending on your instructor's guidelines, you may advise the class at the beginning of your presentation which of these formats you will follow.

Look for Ways to Involve Listeners Actively

Instead of letting your audience sit passively, motivate them to get involved in your presentation. You might ask for a show of hands as you raise a question like, "How many of you have wondered about…?" You might point out the window, encouraging your audience to notice a weather pattern or an example of air pollution. Even stepping away from the podium for a moment can provide variety and increase active listening.

Assess Learning, If Possible

Questions during a speech can help assess understanding, but also run the risk of derailing your speech as the audience pursues one point while you have two more to present. Make time for dialogue after the conclusion of your speech and encourage your audience to write down their questions and ask them at that time. Perhaps asking your audience to reflect on a point, and then to write a few sentences at the conclusion of your speech, might reinforce your central message.

Key Takeaway

To present a successful informative speech, motivate your audience by making your material relevant and useful, finding interesting ways to frame your topic, and emphasizing new aspects if the topic is a familiar one.

Exercises

1. Visit an online news Web site such as CNN, MSNBC, or PBS NewsHour. Select a news video on a topic that interests you and watch it a few times. Identify the ways in which the speaker(s) adapt the presentation to be informative and frame the topic. Discuss your results with your classmates.
2. Watch a news program and write down the words that could be considered to communicate values, bias, or opinion. Share and compare with the class.
3. Watch a news program and find an example that you consider to be objective, "just the facts," and share it with the class.
4. Note how television programs (or other media) use novelty to get your attention. Find at least three headlines, teaser advertisements for television programs, or similar attempts to get attention and share with the class.
5. How can an audience's prior knowledge affect a speech? What percentage of an informative presentation do you expect an audience to remember? Why?

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4.3.4: Diverse Types of Intelligence and Learning Styles

Learning Objectives

1. Define the concepts of multiple intelligences and learning styles, and identify different types of intelligence and learning styles that audience members may have.

Psychologist Howard Gardner is known for developing the theory of multiple intelligences in which he proposes that different people are intelligent in different domains. For example, some people may excel in interpersonal intelligence, or the ability to form and maintain relationships. Other people may excel in bodily-kinesthetic intelligence, or physical coordination and control. Still others have a high degree of musical intelligence or of logico-mathematical intelligence. While some psychologists argue that these are actually talents or aptitudes rather than forms of intelligence, the point remains that individual audience members will receive information differently, depending on the types of intelligence (or talent) they possess.

An outgrowth of the theory of multiple intelligences is the theory of learning styles, the idea that people learn better if the message is presented in a strategy that fits with the types of intelligence in which they are strongest. Consider each style when preparing your speech. What styles might work best with your particular audience?

For example, suppose you work for a do-it-yourself home improvement store and part of your job is to give an informative seminar once a month on how to renovate a previously wallpapered wall. Your topic is specified for you, and you are very familiar with your subject matter, having worked in a variety of homes where old wallpaper needed to be removed or replaced. However, you never know from one month to the next how many people will come to your seminar or what their interests and level of prior knowledge are.

If you begin by going around the room and asking each person to describe the wallpaper situation they plan to work on, this will help you determine what kinds of questions your audience hopes to have answered, but it won't tell you anything about their learning styles. Suppose instead that you ask them to state why they decided to attend and what their career or occupation is. Now you can gauge your presentation according to the likely learning styles of your audience. For example, if you have ten attendees and five of them work in the banking or information technology field, it is probably safe to assume they are fairly strong in the logical or mathematical area. This will help you decide how to talk about measuring the wall, calculating product quantities, and estimating cost. If another attendee is a psychologist, he or she may be able to relate on the intrapersonal and interpersonal level. You may decide to strengthen your remarks about the importance of being comfortable with one's choices for renovating the room, seeking consensus from family members, and considering how the finished room will be suitable for guests. If some attendees work in the arts, they may be especially attentive to your advice about the aesthetic qualities of a well-executed wall surface renovation.

Table $4.3.4.1$ provides a summary of the seven styles and some suggested strategies to help you design your speech to align with each learning style.

Table $4.3.4.1$: Diverse Learning Styles and Strategies

Learning Style	Examples	Strategies
Linguistic	Language, reading, verbal expression, speaking, writing, memorizing words (names, places, and dates)	Reading, oral presentations such as debates, reports, or storytelling
Logical/Mathematical	Use of numbers, perceiving relationships, reasoning (sequential, deductive, inductive), computation	Problem solving, graphic organizers, categorizing, classifying, working with patterns and relationships
Spatial	Think in three dimensions, mental imagery, design color, form and line within space	Maps, charts, graphic organizers, painting or drawing, visual aids, working with pictures or colors
Musical	Discern rhythm, pitch and tone, interpret music, identify tonal patterns, compose music	Rhythmic patterns and exercises, singing, music performance
Bodily/Kinesthetic	Sense of timing and balance, athletics, dance, work that takes physical skill	Drama, role playing, touching and manipulating objects, demonstrating

Learning Style	Examples	Strategies
Interpersonal	Organizing, leading others, communicating, collaboration, negotiating, mediating	Group projects, interaction, debates, discussions, cooperative learning, sharing ideas
Intrapersonal	Reflection, thinking strategies, focusing/concentration	Individual projects, self-paced instruction, note-taking, reflection

Key Takeaway

An informative speech can be more effective when the learning styles of the audience members are addressed.

Exercises

1. Make a list of several people you know well, including family members, lifelong friends, or current roommates. Opposite each person's name, write the types of intelligence or the learning styles in which you believe that person is especially strong. Consider making this a reciprocal exercise by listing your strongest learning styles and asking family and friends to guess what is on your list.
2. How do you learn best? What works for you? Write a short paragraph and share with the class.
3. Write a review of your best teacher, noting why you think they were effective. Share with the class.
4. Write a review of your worst teacher, noting why you think they were ineffective. Share with the class.

References

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4.3.5: Preparing Your Speech to Inform

Learning Objectives

1. Discuss and provide examples of ways to incorporate ethics in a speech.
2. Construct an effective speech to inform.

Now that we've covered issues central to the success of your informative speech, there's no doubt you want to get down to work. Here are five final suggestions to help you succeed.

Start with What You Know

Are you taking other classes right now that are fresh in your memory? Are you working on a challenging chemistry problem that might lend itself to your informative speech? Are you reading a novel by Gabriel García Márquez that might inspire you to present a biographical speech, informing your audience about the author? Perhaps you have a hobby or outside interest that you are excited about that would serve well. Regardless of where you draw the inspiration, it's a good strategy to start with what you know and work from there. You'll be more enthusiastic, helping your audience to listen intently, and you'll save yourself time. Consider the audience's needs, not just your need to cross a speech off your "to-do" list. This speech will be an opportunity for you to take prepared material and present it, gaining experience and important feedback. In the "real world," you often lack time and the consequences of a less than effective speech can be serious. Look forward to the opportunity and use what you know to perform an effective, engaging speech.

Consider Your Audience's Prior Knowledge

You don't want to present a speech on the harmful effects of smoking when no one in the audience smokes. You may be more effective addressing the issue of secondhand smoke, underscoring the relationship to relevance and addressing the issue of importance with your audience. The audience will want to learn something from you, not hear everything they have heard before. It's a challenge to assess what they've heard before, and often a class activity is conducted to allow audience members to come to know each other. You can also use their speeches and topic selection as points to consider. Think about age, gender, and socioeconomic status, as well as your listeners' culture or language. Survey the audience if possible, or ask a couple of classmates what they think of the topics you are considering.

In the same way, when you prepare a speech in a business situation, do your homework. Access the company Web site, visit the location and get to know people, and even call members of the company to discuss your topic. The more information you can gather about your audience, the better you will be able to adapt and present an effective speech.

Adapting Jargon and Technical Terms

You may have a topic in mind from another class or an outside activity, but chances are that there are terms specific to the area or activity. From wakeboarding to rugby to a chemical process that contributes to global warming, there will be jargon and technical terms. Define and describe the key terms for your audience as part of your speech and substitute common terms where appropriate. Your audience will enjoy learning more about the topic and appreciate your consideration as you present your speech.

Using Outside Information

Even if you think you know everything there is to know about your topic, using outside sources will contribute depth to your speech, provide support for your main points, and even enhance your credibility as a speaker. "According to ____________" is a normal way of attributing information to a source, and you should give credit where credit is due. There is nothing wrong with using outside information as long as you clearly cite your sources and do not present someone else's information as your own.

Presenting Information Ethically

A central but often unspoken expectation of the speaker is that we will be ethical. This means, fundamentally, that we perceive one another as human beings with common interests and needs, and that we attend to the needs of others as well as our own. An ethical informative speaker expresses respect for listeners by avoiding prejudiced comments against any group, and by being honest about the information presented, including information that may contradict the speaker's personal biases. The ethical speaker also admits it when he or she does not know something. The best salespersons recognize that ethical communication is the key to success, as it builds a healthy relationship where the customer's needs are met, thereby meeting the salesperson's own needs.

Reciprocity

Tyler discusses ethical communication and specifically indicates reciprocity as a key principle. Reciprocity, or a relationship of mutual exchange and interdependence, is an important characteristic of a relationship, particularly between a speaker and the audience. We've examined previously the transactional nature of communication, and it is important to reinforce this aspect here. We exchange meaning with one another in conversation, and much like a game, it takes more than one person to play. This leads to interdependence, or the dependence of the conversational partners on one another. Inequality in the levels of dependence can negatively impact the communication and, as a result, the relationship. You as the speaker will have certain expectations and roles, but dominating your audience will not encourage them to fulfill their roles in terms of participation and active listening. Communication involves give and take, and in a public speaking setting, where the communication may be perceived as "all to one," don't forget that the audience is also communicating in terms of feedback with you. You have a responsibility to attend to that feedback, and develop reciprocity with your audience. Without them, you don't have a speech.

Mutuality

Mutuality means that you search for common ground and understanding with the audience, establishing this space and building on it throughout the speech. This involves examining viewpoints other than your own, and taking steps to insure the speech integrates an inclusive, accessible format rather than an ethnocentric one.

Nonjudgmentalism

Nonjudgmentalism underlines the need to be open-minded, an expression of one's willingness to examine diverse perspectives. Your audience expects you to state the truth as you perceive it, with supporting and clarifying information to support your position, and to speak honestly. They also expect you to be open to their point of view and be able to negotiate meaning and understanding in a constructive way. Nonjudgmentalism may include taking the perspective that being different is not inherently bad and that there is common ground to be found with each other.

While this characteristic should be understood, we can see evidence of breakdowns in communication when audiences perceive they are not being told the whole truth. This does not mean that the relationship with the audience requires honesty and excessive self-disclosure. The use of euphemisms and displays of sensitivity are key components of effective communication, and your emphasis on the content of your speech and not yourself will be appreciated. Nonjudgmentalism does underscore the importance of approaching communication from an honest perspective where you value and respect your audience.

Honesty

Honesty, or truthfulness, directly relates to trust, a cornerstone in the foundation of a relationship with your audience. Without it, the building (the relationship) would fall down. Without trust, a relationship will not open and develop the possibility of mutual understanding. You want to share information and the audience hopefully wants to learn from you. If you "cherry-pick" your data, only choosing the best information to support only your point and ignore contrary or related issues, you may turn your informative speech into a persuasive one with bias as a central feature.

Look at the debate over the U.S. conflict with Iraq. There has been considerable discussion concerning the cherry-picking of issues and facts to create a case for armed intervention. To what degree the information at the time was accurate or inaccurate will continue to be a hotly debated issue, but the example holds in terms on an audience's response to a perceived dishonestly. Partial truths are incomplete and often misleading, and you don't want your audience to turn against you because they suspect you are being less than forthright and honest.

Respect

Respect should be present throughout a speech, demonstrating the speaker's high esteem for the audience. Respect can be defined as an act of giving and displaying particular attention to the value you associate with someone or a group. This definition involves two key components. You need to give respect in order to earn from others, and you need to show it. Displays of respect include making time for conversation, not interrupting, and even giving appropriate eye contact during conversations.

Trust

Communication involves sharing and that requires trust. Trust means the ability to rely on the character or truth of someone, that what you say you mean and your audience knows it. Trust is a process, not a thing. It builds over time, through increased interaction and the reduction of uncertainty. It can be lost, but it can also be regained. It should be noted that it takes a long time to build trust in a relationship and can be lost in a much shorter amount of time. If your audience suspects you mislead them this time, how will they approach your next presentation? Acknowledging trust and its importance in your relationship with the audience is the first step in focusing on this key characteristic.

Avoid Exploitation

Finally, when we speak ethically, we do not intentionally exploit one another. Exploitation means taking advantage, using someone else for one's own purposes. Perceiving a relationship with an audience as a means to an end and only focusing on what you get out of it, will lead you to treat people as objects. The temptation to exploit others can be great in business situations, where a promotion, a bonus, or even one's livelihood are at stake.

Suppose you are a bank loan officer. Whenever a customer contacts the bank to inquire about applying for a loan, your job is to provide an informative presentation about the types of loans available, their rates and terms. If you are paid a commission based on the number of loans you make and their amounts and rates, wouldn't you be tempted to encourage them to borrow the maximum amount they can qualify for? Or perhaps to take a loan with confusing terms that will end up costing much more in fees and interest than the customer realizes? After all, these practices are within the law; aren't they just part of the way business is done? If you are an ethical loan officer, you realize you would be exploiting customers if you treated them this way. You know it is more valuable to uphold your long-term relationships with customers than to exploit them so that you can earn a bigger commission.

Consider these ethical principles when preparing and presenting your speech, and you will help address many of these natural expectations of others and develop healthier, more effective speeches.

Sample Informative Presentation

Here is a generic sample speech in outline form with notes and suggestions.

Attention Statement

Show a picture of a goldfish and a tomato and ask the audience, "What do these have in common?"

Introduction

1. Briefly introduce genetically modified foods.
2. State your topic and specific purpose: "My speech today will inform you on genetically modified foods that are increasingly part of our food supply."
3. Introduce your credibility and the topic: "My research on this topic has shown me that our food supply has changed but many people are unaware of the changes."
4. State your main points: "Today I will define genes, DNA, genome engineering and genetic manipulation, discuss how the technology applies to foods, and provide common examples."

Body

1. *Information*. Provide a simple explanation of the genes, DNA and genetic modification in case there are people who do not know about it. Provide clear definitions of key terms.
2. *Genes and DNA*. Provide arguments by generalization and authority.
3. *Genome engineering and genetic manipulation*. Provide arguments by analogy, cause, and principle.
4. *Case study*. In one early experiment, GM (genetically modified) tomatoes were developed with fish genes to make them resistant to cold weather, although this type of tomato was never marketed.
5. Highlight other examples.

Conclusion

Reiterate your main points and provide synthesis, but do not introduce new content.

Residual Message

“Genetically modified foods are more common in our food supply than ever before.”

Key Takeaway

In preparing an informative speech, use your knowledge and consider the audience’s knowledge, avoid unnecessary jargon, give credit to your sources, and present the information ethically.

Exercises

1. Identify an event or issue in the news that interests you. On at least three different news networks or Web sites, find and watch video reports about this issue. Compare and contrast the coverage of the issue. Do the networks or Web sites differ in their assumptions about viewers’ prior knowledge? Do they give credit to any sources of information? To what extent do they each measure up to the ethical principles described in this section? Discuss your findings with your classmates.
2. Find an example of reciprocity in a television program and write two to three paragraphs describing it. Share and compare with your classmates.
3. Find an example of honesty in a television program and write two to three paragraphs describing it. Share and compare with your classmates.
4. Find an example of exploitation depicted in the media. Describe how the exploitation is communicated with words and images and share with the class.
5. Compose a general purpose statement and thesis statement for a speech to inform. Now create a sample outline. Share with a classmate and see if he or she offers additional points to consider.

References

Tyler, V. (1978). Report of the working groups of the second SCA summer conference on intercultural communication. In N. C. Asuncio-Lande (Ed.), *Ethical Perspectives and Critical Issues in Intercultural Communication* (pp. 170–177). Falls Church, VA: SCA.

4.3.6: Creating an Informative Presentation

Learning Objectives

1. Discuss the parts of an informational presentation.
2. Understand the five parts of any presentation.

An informational presentation is common request in business and industry. It's the verbal and visual equivalent of a written report. Information sharing is part of any business or organization. Informative presentations serve to present specific information for specific audiences for specific goals or functions. The type of presentation is often identified by its primary purpose or function. Informative presentations are often analytical or involve the rational analysis of information. Sometimes they simply "report the facts" with no analysis at all, but still need to communicate the information in a clear and concise format. While a presentation may have conclusions, propositions, or even a call to action, the demonstration of the analysis is the primary function.

A sales report presentation, for example, is not designed to make a sale. It is, however, supposed to report sales to date and may forecast future sales based on previous trends.

An informative presentation does not have to be a formal event, though it can be. It can be generic and nonspecific to the audience or listener, but the more you know about your audience, the better. When you tailor your message to that audience, you zero in on your target and increase your effectiveness. The emphasis is on clear and concise communication, but it may address several key questions:

- Topic: Product or Service?
- Who are you?
- Who is the target market?
- What is the revenue model?
- What are the specifications?
- How was the information gathered?
- How does the unit work?
- How does current information compare to previous information?

Table $4.3.6.1$lists the five main parts or components of any presentation (McLean, S., 2003).

Table $4.3.6.1$: Presentation Components and Their Functions

Component	Function
Attention Statement	Raise interest and motivate the listener
Introduction	Communicate a point and common ground
Body	Address key points
Conclusion	Summarize key points
Residual Message	Communicate central theme, moral of story, or main point

You will need to address the questions to establish relevance and meet the audience's needs. The five parts of any speech will serve to help you get organized.

Sample Speech Guidelines

Imagine that you have been assigned to give an informative presentation lasting five to seven minutes. Follow the guidelines in Table $4.3.6.2$and apply them to your presentation.

Table $4.3.6.2$: Sample Speech Guidelines

1. Topic	Choose a product or service that interests you, research it, and report your findings in your speech.
2. Purpose	Your general purpose, of course, is to inform. But you need to formulate a more specific purpose statement that expresses a point you have to make about your topic—what you hope to accomplish in your speech.

3. Audience	Think about what your audience might already know about your topic and what they may not know, and perhaps any attitudes toward or concerns about it. Consider how this may affect the way that you will present your information.
4. Supporting Materials	Using the information gathered in your search for information, determine what is most worthwhile, interesting, and important to include in your speech. Time limits will require that you be selective about what you use. **Use visual aids!**
5. Organization	1. Write a central idea statement that expresses the message, or point, that you hope to get across to your listeners in the speech. 2. Determine the two to three main points that will be needed to support your central idea. 3. Finally, prepare a complete sentence outline of the body of the speech.
6. Introduction	Develop an opening that will 1. get the attention and interest of your listeners, 2. express your central idea or message, 3. lead into the body of your speech.
7. Conclusion	The conclusion should review and/or summarize the important ideas in your speech and bring it to a smooth close.
8. Delivery	The speech should be delivered extemporaneously (not reading but speaking), using speaking notes and not reading from the manuscript. Work on maximum eye contact with your listeners. Use any visual aids or handouts that may be helpful.

Key Takeaway

Informative presentations illustrate, explain, describe, and instruct the audience on topics and processes.

Exercises

1. Write a brief summary of a class or presentation you personally observed recently; include what you learned. Compare with classmates.
2. Search online for an informative speech or presentation that applies to business or industry. Indicate one part or aspect of the presentation that you thought was effective and one you would improve. Provide the link to the presentation in your post or assignment.
3. Pick a product or service and come up with a list of five points that you could address in a two-minute informative speech. Place them in rank order and indicate why.
4. With the points discussed in this chapter in mind, observe someone presenting a speech. What elements of their speech could you use in your speech? What elements would you not want to use? Why? Compare with a classmate.

References

McLean, S. (2003). *The basics of speech communication*. Boston: Allyn & Bacon.

4.3.7: Additional Resources

To listen to speeches from great figures in history, visit the History Channel's audio speech archive. http://www.history.com/speeches

What were the greatest speeches of the twentieth century? Find out here. http://gos.sbc.edu/top100.html

Visit this eHow link for a great video demonstrating how to remove ink stains from clothing. www.ehow.com/video_2598_remove-ink-stains.html

To improve your enunciation, try these exercises from the Mount Holyoke College site. www.mtholyoke.edu/acad/intrel/speech/enunciation.htm

The Merriam-Webster dictionary site provides a wealth of resources on words, their meanings, their origins, and audio files of how to pronounce them. http://www.merriam-webster.com

For information on adapting your speech for an audience or audience members with special needs, explore this index of resources compiled by Ithaca College. www.ithaca.edu/wise/disabilities/

Dr. Richard Felder of North Carolina State University presents this questionnaire to assess your learning styles. www.engr.ncsu.edu/learningstyles/ilsweb.html

The American Speech-Language-Hearing Association offers an array of Web resources on ethics. http://www.asha.org/practice/ethics

Visit this site for a list informative topics for a business speech. http://smallbusiness.chron.com/ideas-informative-speech-topics-business-81465.html

Visit this eHow site to get ideas for an audience-oriented informative speech topic. http://www.ehow.com/how_2239702_choose-topic-informative-speech.html

SECTION OVERVIEW

4.4: Presentations to Persuade

Persuasion is an act or process of presenting arguments to move, motivate, or change your audience. Aristotle taught that **rhetoric**, or the art of public speaking, involves the faculty of observing in any given case the available means of persuasion (Covino, W. A. and Jolliffe, D. A., 1995). In the case of President Obama, he may have appealed to your sense of duty and national values. In persuading your parents to lend you the car keys, you may have asked one parent instead of the other, calculating the probable response of each parent and electing to approach the one who was more likely to adopt your position (and give you the keys). Persuasion can be implicit or explicit and can have both positive and negative effects. In this chapter we'll discuss the importance of ethics, as we have in previous chapters, when presenting your audience with arguments in order to motivate them to adopt your view, consider your points, or change their behavior.

Thumbnail: www.pexels.com/photo/man-bes...ground-716276/

4.4.1: What Is Persuasion?

Learning Objectives

- Demonstrate an understanding of the importance of persuasion.
- Describe similarities and differences between persuasion and motivation.

Motivation is distinct from persuasion in that it involves the force, stimulus, or influence to bring about change. Persuasion is the process, and motivation is the compelling stimulus that encourages your audience to change their beliefs or behavior, to adopt your position, or to consider your arguments. Why think of yourself as fat or thin? Why should you choose to spay or neuter your pet? Messages about what is beautiful, or what is the right thing to do in terms of your pet, involve persuasion, and the motivation compels you to do something.

Another way to relate to motivation also can be drawn from the mass media. Perhaps you have watched programs like *Law and Order*, *Cold Case*, or *CSI* where the police detectives have many of the facts of the case, but they search for motive. They want to establish motive in the case to provide the proverbial "missing piece of the puzzle." They want to know why someone would act in a certain manner. You'll be asking your audience to consider your position and provide both persuasive arguments and motivation for them to contemplate. You may have heard a speech where the speaker tried to persuade you, tried to motivate you to change, and you resisted the message. Use this perspective to your advantage and consider why an audience should be motivated, and you may find the most compelling examples or points. Relying on positions like "I believe it, so you should too," "Trust me, I know what is right," or "It's the right thing to do" may not be explicitly stated but may be used with limited effectiveness. Why should the audience believe, trust, or consider the position "right?" Keep an audience-centered perspective as you consider your persuasive speech to increase your effectiveness.

You may think initially that many people in your audience would naturally support your position in favor of spaying or neutering your pet. After careful consideration and audience analysis, however, you may find that people are more divergent in their views. Some audience members may already agree with your view, but others may be hostile to the idea for various reasons. Some people may be neutral on the topic and look to you to consider the salient arguments. Your audience will have a range of opinions, attitudes, and beliefs across a range from hostile to agreement.

Rather than view this speech as a means to get everyone to agree with you, look at the concept of measurable gain, a system of assessing the extent to which audience members respond to a persuasive message. You may reinforce existing beliefs in the members of the audience that agree with you and do a fine job of persuasion. You may also get hostile members of the audience to consider one of your arguments, and move from a hostile position to one that is more neutral or ambivalent. The goal in each case is to move the audience members toward your position. Some change may be small but measurable, and that is considered gain. The next time a hostile audience member considers the issue, they may be more open to it. Figure 4.4.1.1 is a useful diagram to illustrate this concept.

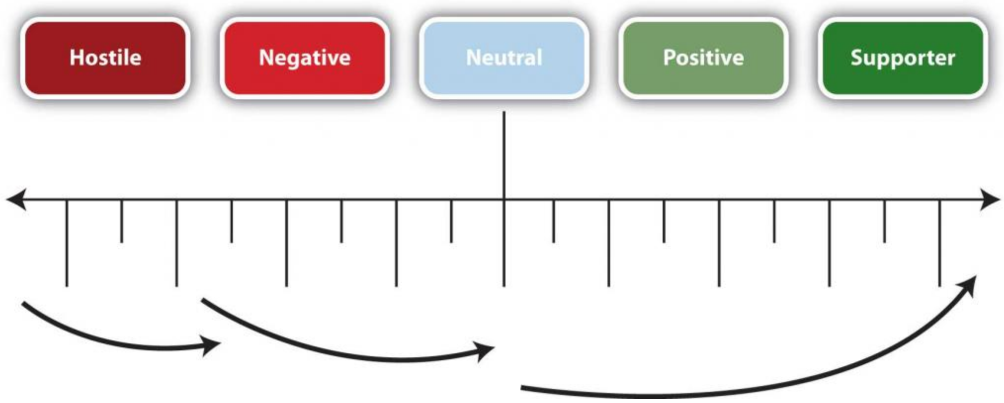


Figure 4.4.1.1: Measurable Gain: Edward Hall also underlines this point when discussing the importance of context. The situation in which a conversation occurs provides a lot of meaning and understanding for the participants in some cultures. In Japan, for example, the context, such as a business setting, says a great deal about the conversation and the meaning to the words and expressions within that context. In the United States, however, the concept of a workplace or a business meeting is less structured, and the context offers less meaning and understanding.

Cultures that value context highly are aptly called high-context cultures. Those that value context to a lesser degree are called low-context cultures. These divergent perspectives influence the process of persuasion and are worthy of your consideration when planning your speech. If your audience is primarily high-context, you may be able to rely on many cultural norms as you proceed, but in a low-context culture, like the United States, you'll be expected to provide structure and clearly outline your position and expectations. This ability to understand motivation and context is key to good communication, and one we will examine throughout this chapter.

Key Takeaway

Persuasion is the act of presenting arguments for change, while motivation involves the force to bring about change. The concept of measurable gain assesses audience response to a persuasive message.

Exercises

1. Select an online advertisement that you find particularly effective or ineffective. Why does it succeed, or fail, in persuading you to want to buy the advertised product? Discuss your ideas with your classmates.
2. Think of a social issue, widely held belief, or political position where change has occurred in your lifetime, or where you would like to see change happen. What kinds of persuasion and motivation were involved—or would need to happen—to produce measurable gain? Explain your thoughts to a classmate.
3. Think of a time when someone tried to persuade you to do something you did not want to do. Did their persuasion succeed? Why or why not? Discuss the event with a classmate.

References

- Covino, W. A., & Jolliffe, D. A. (1995). *Rhetoric: Concepts, definitions, boundaries*. Boston, MA: Allyn & Bacon.
- Hall, E. (1966). *The hidden dimension*. New York, NY: Doubleday.

4.4.2: Principles of Persuasion

Learning Objectives

1. Identify and demonstrate how to use six principles of persuasion.

What is the best way to succeed in persuading your listeners? There is no one "correct" answer, but many experts have studied persuasion and observed what works and what doesn't. Social psychologist Robert Cialdini offers us six principles of persuasion that are powerful and effective:

1. Reciprocity
2. Scarcity
3. Authority
4. Commitment and consistency
5. Consensus
6. Liking

You will find these principles both universal and adaptable to a myriad of contexts and environments. Recognizing when each principle is in operation will allow you to leverage the inherent social norms and expectations to your advantage, and enhance your sales position.

Principle of Reciprocity

Reciprocity is the mutual expectation for exchange of value or service. In all cultures, when one person gives something, the receiver is expected to reciprocate, even if only by saying "thank you." There is a moment when the giver has power and influence over the receiver, and if the exchange is dismissed as irrelevant by the giver the moment is lost. In business this principle has several applications. If you are in customer service and go out of your way to meet the customer's need, you are appealing to the principle of reciprocity with the knowledge that all humans perceive the need to reciprocate—in this case, by increasing the likelihood of making a purchase from you because you were especially helpful. Reciprocity builds trust and the relationship develops, reinforcing everything from personal to brand loyalty. By taking the lead and giving, you build in a moment where people will feel compelled from social norms and customs to give back.

Principle of Scarcity

You want what you can't have, and it's universal. People are naturally attracted to the exclusive, the rare, the unusual, and the unique. If they are convinced that they need to act now or it will disappear, they are motivated to action. Scarcity is the perception of inadequate supply or a limited resource. For a sales representative, scarcity may be a key selling point—the particular car, or theater tickets, or pair of shoes you are considering may be sold to someone else if you delay making a decision. By reminding customers not only of what they stand to gain but also of what they stand to lose, the representative increases the chances that the customer will make the shift from contemplation to action and decide to close the sale.

Principle of Authority

Trust is central to the purchase decision. Whom does a customer turn to? A salesperson may be part of the process, but an endorsement by an authority holds credibility that no one with a vested interest can ever attain. Knowledge of a product, field, trends in the field, and even research can make a salesperson more effective by the appeal to the principle of authority. It may seem like extra work to educate your customers, but you need to reveal your expertise to gain credibility. We can borrow a measure of credibility by relating what experts have indicated about a product, service, market, or trend, and our awareness of competing viewpoints allows us insight that is valuable to the customer. Reading the manual of a product is not sufficient to gain expertise—you have to do extra homework. The principal of authority involves referencing experts and expertise.

Principle of Commitment and Consistency

Oral communication can be slippery in memory. What we said at one moment or another, unless recorded, can be hard to recall. Even a handshake, once the symbol of agreement across almost every culture, has lost some of its symbolic meaning and social regard. In many cultures, the written word holds special meaning. If we write it down, or if we sign something, we are more likely to follow through. By extension, even if the customer won't be writing anything down, if you do so in front of them, it can appeal to the principle of commitment and consistency and bring the social norm of honoring one’s word to bear at the moment of purchase.

Principle of Consensus

Testimonials, or first person reports on experience with a product or service, can be highly persuasive. People often look to each other when making a purchase decision, and the herd mentality is a powerful force across humanity: if “everybody else” thinks this product is great, it must be great. We often choose the path of the herd, particularly when we lack adequate information. Leverage testimonials from clients to attract more clients by making them part of your team. The principle of consensus involves the tendency of the individual to follow the lead of the group or peers.

Principle of Liking

Safety is the twin of trust as a foundation element for effective communication. If we feel safe, we are more likely to interact and communicate. We tend to be attracted to people who communicate to us that they like us, and who make us feel good about ourselves. Given a choice, these are the people with whom we are likely to associate. Physical attractiveness has long been known to be persuasive, but similarity is also quite effective. We are drawn to people who are like us, or who we perceive ourselves to be, and often make those judgments based on external characteristics like dress, age, sex, race, ethnicity, and perceptions of socioeconomic status. The principle of liking involves the perception of safety and belonging in communication.

Key Takeaway

A persuasive message can succeed through the principles of reciprocity, scarcity, authority, commitment and consistency, consensus, and liking.

Exercises

1. Think of a real-life example of the principle of scarcity being used in a persuasive message. Were you the one trying to persuade someone, or were you the receiver of the scarcity message? Was the message effective? Discuss your thoughts with a classmate.
2. Do you think the principle of consensus often works—are people often persuaded to buy things because other people own that item, or are going to buy it? Are you susceptible to this kind of persuasion? Think of some examples and discuss them with classmates.
3. Do people always use reason to make decisions? Support your opinion and discuss it with classmates.
4. Make a list of five or six people you choose to associate with—friends, neighbors, and coworkers, for example. Next to each person’s name, write the characteristics you have in common with that person. Do you find that the principle of liking holds true in your choice of associates? Why or why not? Discuss your findings with your classmates.

References

Cialdini, R. (1993). *Influence*. New York, NY: Quill.

4.4.3: Functions of the Presentation to Persuade

Learning Objectives

1. Identify and demonstrate the effective use of five functions of speaking to persuade.

What does a presentation to persuade do? There is a range of functions to consider, and they may overlap or you may incorporate more than one as you present. We will discuss how to

- stimulate,
- convince,
- call to action,
- increase consideration, and
- develop tolerance of alternate perspectives.

We will also examine how each of these functions influences the process of persuasion.

Stimulate

When you focus on stimulation as the goal or operational function of your speech, you want to reinforce existing beliefs, intensify them, and bring them to the forefront. Perhaps you've been concerned with global warming for quite some time. Many people in the audience may not know about the melting polar ice caps and the loss of significant ice shelves in Antarctica, including part of the Ross Ice Shelf, an iceberg almost 20 miles wide and 124 miles long, more than twice the size of Rhode Island. They may be unaware of how many ice shelves have broken off, the 6 percent drop in global phytoplankton (the basis of many food chains), and the effects of the introduction of fresh water to the oceans. By presenting these facts, you will reinforce existing beliefs, intensify them, and bring the issue to the surface. You might consider the foundation of common ground and commonly held beliefs, and then introduce information that a mainstream audience may not be aware of that supports that common ground as a strategy to stimulate.

Convince

In a persuasive speech, the goal is to change the attitudes, beliefs, values, or judgments of your audience. If we look back at the idea of motive, in this speech the prosecuting attorney would try to convince the jury members that the defendant is guilty beyond reasonable doubt. He or she may discuss motive, present facts, all with the goal to convince the jury to believe or find that his or her position is true. In the film *The Day After Tomorrow*, Dennis Quaid stars as a paleoclimatologist who unsuccessfully tries to convince the U.S. vice president that a sudden climate change is about to occur. In the film, much like real life, the vice president listens to Quaid's position with his own bias in mind, listening for only points that reinforce his point of view while rejecting points that do not.

Audience members will also hold beliefs and are likely to involve their own personal bias. Your goal is to get them to agree with your position, so you will need to plan a range of points and examples to get audience members to consider your topic. Perhaps you present Dennis Quaid's argument that loss of the North Atlantic Current will drastically change our climate, clearly establishing the problem for the audience. You might cite the review by a professor, for example, who states in reputable science magazine that the film's depiction of a climate change has a chance of happening, but that the timetable is more on the order of ten years, not seven days as depicted in the film. You then describe a range of possible solutions. If the audience comes to a mental agreement that a problem exists, they will look to you asking, "What are the options?" Then you may indicate a solution that is a better alternative, recommending future action.

Call to Action

In this speech, you are calling your audience to action. You are stating that it's not about stimulating interest to reinforce and accentuate beliefs, or convincing an audience of a viewpoint that you hold, but instead that you want to see your listeners change their behavior. If you were in sales at Toyota, you might incorporate our previous example on global warming to reinforce, and then make a call to action (make a purchase decision), when presenting the Prius hybrid (gas-electric) automobile. The economics, even at current gas prices, might not completely justify the difference in price between a hybrid and a nonhybrid car. However, if you as the salesperson can make a convincing argument that choosing a hybrid car is the right and responsible decision, you may be more likely to get the customer to act. The persuasive speech that focuses on action often generates curiosity, clarifies a problem, and as we have seen, proposes a range of solutions. They key difference here is there is a clear link to action associated with the solutions.

Figure 4.4.3.1: A call to action features a clear response for the audience. P T – The poster is not…but are you ? – CC BY-NC-ND 2.0.

Solutions lead us to considering the goals of action. These goals address the question, "What do I want the audience to do as a result of being engaged by my speech?" The goals of action include adoption, discontinuance, deterrence, and continuance.

Adoption means the speaker wants to persuade the audience to take on a new way of thinking, or adopt a new idea. Examples could include buying a new product, voting for a new candidate, or deciding to donate blood. The key is that the audience member adopts, or takes on, a new view, action, or habit.

Discontinuance involves the speaker persuading the audience to stop doing something what they have been doing, such as smoking. Rather than take on a new habit or action, the speaker is asking the audience member to stop an existing behavior or idea. As such, discontinuance is in some ways the opposite of adoption.

Deterrence is a call action that focuses on persuading audience not to start something if they haven't already started. Perhaps many people in the audience have never tried illicit drugs, or have not gotten behind the wheel of a car while intoxicated. The goal of action in this case would be to deter, or encourage the audience members to refrain from starting or initiating the behavior.

Finally, with continuance, the speaker aims to persuade the audience to continue doing what they have been doing, such as reelect a candidate, keep buying product, or staying in school to get an education.

A speaker may choose to address more than one of these goals of action, depending on the audience analysis. If the audience is largely agreeable and supportive, you may find continuance to be one goal, while adoption is secondary.

These goals serve to guide you in the development of solution steps. Solution steps involve suggestions or ways the audience can take action after your speech. They often proceed from national to personal level, or the inverse. Audience members appreciate a clear discussion of the problem in a persuasive speech, but they also appreciate solutions. You might offer a national solution that may be viewed as unworkable, but your solution on a personal level may be more realistic, such as considering an alternate point of view or making a small donation to a worthy cause.

Increase Consideration

Perhaps you know that your audience is not open to emotional appeals that involve the fear of global warming, so you choose to base your persuasive speech on something they are more open to: the economic argument and the relative cost of car ownership. In this speech, you want to increase consideration on the part of the audience whose members either hold hostile views or perhaps are neutral and simply curious. You might be able to compare and contrast competing cars and show that the costs over ten years are quite similar, but that the Prius has additional features that are the equivalent of a bonus, including high gas mileage. You might describe tax incentives for ownership, maintenance schedules and costs, and resale value. Your arguments and their support aim at increasing the audience's consideration of your position. You won't be asking for action in this presentation, but a corresponding increase of consideration may lead the customer to that point at a later date.

Develop Tolerance of Alternate Perspectives

Finally, you may want to help your audience develop tolerance of alternate perspectives and viewpoints. Perhaps your audience, as in the previous example, is interested in purchasing a car and you are the lead salesperson on that model. As you listen, and do your informal audience analysis, you may learn that horsepower and speed are important values to this customer. You might raise the issue of torque versus horsepower and indicate that the "uumph" you feel as you start a car off the line is torque. Many hybrid and even electric vehicles have great torque, as their systems involve fewer parts and less friction than a corresponding internal combustion-transaxle system. You goal is to help your audience develop tolerance, but not necessarily acceptance, of alternate perspectives. A traditional way of measuring speed has always been how fast a car can go from zero to sixty miles per hour.

You are essentially indicating that there are two relevant factors to consider when discussing speed (horsepower and torque), and asking the customer to consider the alternate perspective. Lots of horsepower might be all right for high speeds, but by raising the issue of their normal driving, they might learn that what counts day in and day out for driving is torque, not horsepower. By starting from common ground, and introducing a related idea, you are persuading your audience to consider an alternate perspective.

Key Takeaway

A persuasive speech may stimulate thought, convince, call to action, increase consideration, or develop tolerance of alternate perspectives.

Exercises

1. Select a commercial for a product or service you do not believe you would ever buy. Evaluate the commercial according to the principles of persuasion described in this section. Does it use more than one principle? Is any principle effective on you as an audience member? If you could change the commercial to increase its persuasive appeal to yourself as a customer, what changes would you make? Discuss your findings with your classmates.
2. Which do you think is a more difficult challenge, discontinuance or deterrence? Why? Give some examples and discuss them with your classmates.
3. Do you think persuasion by continuance is necessary? Or would people continue a given behavior regardless of any persuasive messages? Think of an example and discuss it with your classmates.

4.4.4: Meeting the Listener's Basic Needs

Learning Objectives

1. Identify and describe several basic needs that people seek to fulfill when they communicate.

In this section we will examine why we communicate, illustrating how meeting the listener's basic needs is central to effective communication. It's normal for the audience to consider why you are persuading them, and there is significant support for the notion that by meeting the audience's basic needs, whether they are a customer, colleague, or supervisor, you will more effectively persuade them to consider your position.

Not all oral presentations involve taking a position, or overt persuasion, but all focus on the inherent relationships and basic needs within the business context. Getting someone to listen to what you have to say involves a measure of persuasion, and getting that person to act on it might require considerable skill. Whether you are persuading a customer to try a new product or service, or informing a supplier that you need additional merchandise, the relationship is central to your communication. The emphasis inherent in our next two discussions is that we all share this common ground, and by understanding that we share basic needs, we can better negotiate meaning and achieve understanding.

Table 4.4.4.1 presents some reasons for engaging in communication. As you can see, the final item in the table indicates that we communicate in order to meet our needs. What are those needs? We will discuss them next.

Table 4.4.4.1: Reasons for Engaging in Communication

Review	Why We Engage in Communication
Gain Information	We engage in communication to gain information. This information can involve directions to an unknown location, or a better understanding about another person through observation or self-disclosure.
Understand Communication Contexts	We also want to understand the context in which we communication, discerning the range between impersonal and intimate, to better anticipate how to communicate effectively in each setting.
Understand Our Identity	Through engaging in communication, we come to perceive ourselves, our roles, and our relationships with others.
Meet Our Needs	We meet our needs through communication.

Maslow's Hierarchy

If you have taken courses in anthropology, philosophy, psychology, or perhaps sociology in the past, you may have seen Maslow's hierarchy of needs (Figure 4.4.4.1). Psychologist Abraham Maslow provides seven basic categories for human needs, and arranges them in order of priority, from the most basic to the most advanced.

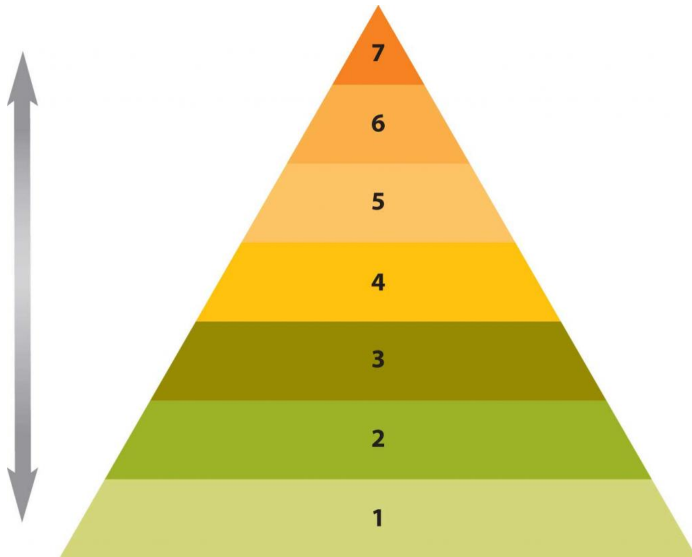


Figure 4.4.4.1: Maslow's Hierarchy

In this figure, we can see that we need energy, water, and air to live. Without any of these three basic elements, which meet our physiological needs (1), we cannot survive. We need to meet them before anything else, and will often sacrifice everything else to get them. Once we have what we need to live, we seek safety (2). A defensible place, protecting your supply lines for your most basic needs, could be your home. For some, however, home is a dangerous place that compromises their safety. Children and victims of domestic violence need shelter to meet this need. In order to leave a hostile living environment, people may place the well-being and safety of another over their own needs, in effect placing themselves at risk. An animal would fight for its own survival above all else, but humans can and do acts of heroism that directly contradict their own self-interest. Our own basic needs motivate us, but sometimes the basic needs of others are more important to us than our own.

We seek affection from others once we have the basics to live and feel safe from immediate danger. We look for a sense of love and belonging (3). All needs in Maslow's model build on the foundation of the previous needs, and the third level reinforces our need to be a part of a family, community, or group. This is an important step that directly relates to business communication. If a person feels safe at your place of business, they are more likely to be open to communication. Communication is the foundation of the business relationship, and without it, you will fail. If they feel on edge, or that they might be pushed around, made to feel stupid, or even unwanted, they will leave and your business will disappear. On the other hand, if you make them feel welcome, provide multiple ways for them to learn, educate themselves, and ask questions in a safe environment, you will form relationships that transcend business and invite success.

Once we have been integrated in a group, we begin to assert our sense of self and self-respect, addressing our need for self-esteem (4). Self-esteem is essentially how we feel about ourselves. Let's say you are a male, but you weren't born with a "fix-it" gene. It's nothing to be ashamed of, but for many men it can be hard to admit. We no longer live in a time when we have to build our own houses or learn about electricity and plumbing as we grow up, and if it is not part of your learning experience, it is unreasonable to expect that you'll be handy with a wrench from the first turn.

The do-it-yourself chain Home Depot may have recognized how this interest in home repair is paired with many men's reluctance to admit their lack of experience. They certainly turned it into an opportunity. Each Saturday around the country, home repair clinics on all sorts of tasks, from cutting and laying tile to building a bird house, are available free to customers at Home Depot stores. You can participate, learn, gain mastery of a skill set, and walk out of the store with all the supplies you need to get the job done. You will also now know someone (the instructor, a Home Depot employee) whom you can return to for follow-up questions. Ultimately, if you don't succeed in getting the job done right, they will help you arrange for professional installation. This model reinforces safety and familiarity, belonging to a group or perceiving a trustworthy support system, and the freedom to make mistakes. It's an interactive program that squarely addresses one of customers' basic of human needs.

Maslow discusses the next level of needs in terms of how we feel about ourselves and our ability to assert control and influence over our lives. Once we are part of a group and have begun to assert ourselves, we start to feel as if we have reached our potential and are actively making a difference in our own world. Maslow calls this self-actualization (5). Self-actualization can involve reaching your full potential, feeling accepted for who you are, and perceiving a degree of control or empowerment in your environment. It may mean the freedom to go beyond building the bird house to the tree house, and to design it yourself as an example of self-expression.

As we progress beyond these levels, our basic human curiosity about the world around us emerges. When we have our basic needs met, we do not need to fear losing our place in a group or access to resources. We are free to explore and play, discovering the world around us. Our need to know (6) motivates us to grow and learn. You may have taken an elective art class that sparked your interest in a new area, or your started a new sport or hobby, like woodworking. If you worked at low-paying jobs that earned you barely enough to meet your basic needs, you may not be able to explore all your interests. You might be too exhausted after sixty or seventy hours a week on a combination of the night shift and the early morning shift across two jobs. If you didn't have to work as many hours to meet your more basic needs, you'd have time to explore your curiosity and address the need to learn. Want to read a good book? You'd have the time. Want to take a watercolor class? Sounds interesting. If, however, we are too busy hunting and gathering food, there is little time for contemplating beauty.

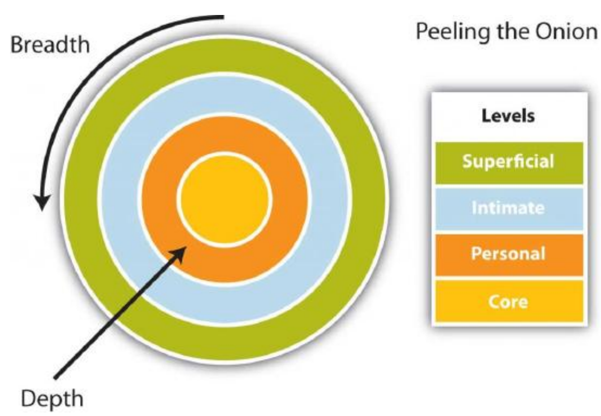
Beyond curiosity lies the aesthetic need to experience beauty (7). Form is freed from function, so that a wine bottle opener can be appreciated for its clever design that resembles a rabbit's head instead of simply how well it works to remove the cork. The appreciation of beauty transcends the everyday, the usual; it becomes exceptional. You may have walked in a building or church and become captivated by the light, the stained-glass windows, or the design. That moment that transcends the mundane, that stops you in your tracks, comes close to describing the human appreciation for the aesthetic, but it's really up to you.

We can see in Maslow's hierarchy how our most basic needs are quite specific, and as we progress through the levels, the level of abstraction increases until ultimately we are freed from the daily grind to contemplate the meaning of a modern painting. As we increase our degree of interconnectedness with others, we become interdependent and, at the same time, begin to express independence and individuality. As a speaker, you may seek the safety of the familiar, only to progress with time and practice to a point where you make words your own.

Your audience will share with you a need for control. You can help meet this need by constructing your speech with an effective introduction, references to points you've discussed, and a clear conclusion. The introduction will set up audience expectations of points you will consider, and allow the audience to see briefly what is coming. Your internal summaries, signposts, and support of your main points all serve to remind the audience what you've discussed and what you will discuss. Finally, your conclusion answers the inherent question, "Did the speaker actually talk about what they said they were going to talk about?" and affirms to the audience that you have fulfilled your objectives.

Social Penetration Theory

The field of communication draws from many disciplines, and in this case, draws lessons from two prominent social psychologists. Irwin Altman and Dalmas Taylor articulated the social penetration theory, which describes how we move from superficial talk to intimate and revealing talk (Altman, I. and Taylor, D., 1973). Altman and Taylor discuss how we attempt to learn about others so that we can better understand how to interact (Altman, I. and Taylor, D., 1973). With a better understanding of others and with more information, we are in a better position to predict how they may behave, what they may value, or what they might feel in specific situations. We usually gain this understanding of others without thinking about it through observation or self-disclosure. In this model, often called the "onion model," we see how we start out on superficial level, but as we peel away the layers, we gain knowledge about the other person that encompasses both breadth and depth.



CFigure 4.4.4.4 Altman and Taylor's Social Penetration Model. Source: Adapted from Altman and Taylor's social penetration model (Altman, I and Taylor, D., 1973).

We come to know more about the way a person perceives a situation (breadth), but also gain perspective into how they see the situation through an understanding of their previous experiences (depth). Imagine these two spheres, which represent people, coming together. What touches first? The superficial level. As the two start to overlap, the personal levels may touch, then the intimate level, and finally the core levels may even touch. Have you ever known a couple—perhaps your parents or grandparents—who have been together for a very long time? They know each other's stories and finish each other's sentences. They might represent the near overlap, where their core values, attitudes, and beliefs are similar through a lifetime of shared experiences.

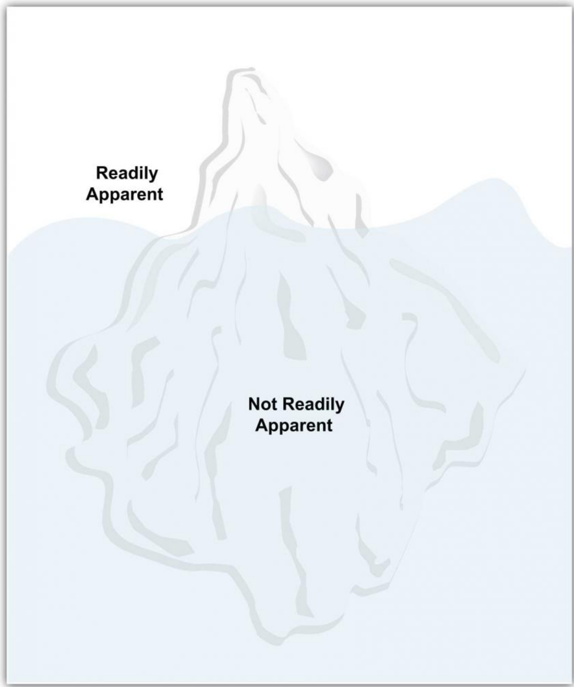


Figure 4.4.4.5: American Foreign Service Manual Iceberg Model: We move from public to private information as we progress from small talk to intimate conversations. Imagine an onion. The outer surface can be peeled away, and each new layer reveals another until you arrive at the heart of the onion. People interact on the surface, and only remove layers as trust and confidence grows.

Another way to look at it is to imagine an iceberg. How much of the total iceberg can you see from the surface of the ocean? Not much. But once you start to look under the water, you gain an understanding of the large size of the iceberg, and the extent of its depth. We have to go beyond superficial understanding to know each other, and progress through the process of self-disclosure to come to know and understand one another. See Figure 4.4.4.5 for an illustration of an "iceberg model" adapted from the American Foreign Service Manual (American Foreign Service Manual, 1975). This model has existed in several forms since the 1960s, and serves as a useful illustration of how little we perceive of each other with our first impressions and general assumptions.

Key Takeaway

We are motivated to communicate in order to gain information, get to know one another, better understand our situation or context, come to know ourselves and our role or identity, and meet our fundamental interpersonal needs.

Exercises

1. Consider your life in relation to Maslow's hierarchy of needs. To what degree do you feel you have attained the different levels in the hierarchy? Two or three years ago, were you at the same level where you currently are, or has your position in the hierarchy changed? In what ways do you expect it to change in the future? Discuss your thoughts with your classmates.
2. Think of someone you have met but do not know very well. What kinds of conversations have you had with this person? How might you expect your conversations to change if you have more opportunities to get better acquainted? Discuss your thoughts with a classmate.
3. Think of a conversation you have had within the past day. What were the reasons for having that conversation? Can you relate it to the reasons for engaging in conversation listed in Table 4.4.4.1? Discuss your thoughts with a classmate.
4. Write a brief paragraph about getting to know someone. Discuss whether, in your experience, it followed the social penetration theory. Share and compare with classmates.

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4.4.5: Making an Argument

Learning Objectives

1. Label and discuss three components of an argument.
2. Identify and provide examples of emotional appeals.

According to the famous satirist Jonathan Swift, "Argument is the worst sort of conversation." You may be inclined to agree. When people argue, they are engaged in conflict and it's usually not pretty. It sometimes appears that way because people resort to fallacious arguments or false statements, or they simply do not treat each other with respect. They get defensive, try to prove their own points, and fail to listen to each other.

But this should not be what happens in persuasive argument. Instead, when you make an argument in a persuasive speech, you will want to present your position with logical points, supporting each point with appropriate sources. You will want to give your audience every reason to perceive you as an ethical and trustworthy speaker. Your audience will expect you to treat them with respect, and to present your argument in way that does not make them defensive. Contribute to your credibility by building sound arguments and using strategic arguments with skill and planning.

In this section, we will briefly discuss the classic form of an argument, a more modern interpretation, and finally seven basic arguments you may choose to use. Imagine that each is a tool in your toolbox, and that you want to know how to use each effectively. Know that people who try to persuade you, from telemarketers to politics, usually have these tools at hand.

Let's start with a classical rhetorical strategy, as shown in Table $4.4.5.1$. It asks the rhetorician, speaker, or author to frame arguments in six steps.

Table $4.4.5.1$: Classical Rhetorical Strategy

1. Exordium	Prepares the audience to consider your argument
2. Narration	Provides the audience with the necessary background or context for your argument
3. Proposition	Introduces your claim being argued in the speech
4. Confirmation	Offers the audience evidence to support your argument
5. Refutation	Introduces to the audience and then discounts or refutes the counterarguments or objections
6. Peroration	Your conclusion of your argument

The classical rhetorical strategy is a standard pattern and you will probably see it in both speech and English courses. The pattern is useful to guide you in your preparation of your speech and can serve as a valuable checklist to ensure that you are prepared. While this formal pattern has distinct advantages, you may not see it used exactly as indicated here on a daily basis. What may be more familiar to you is Stephen Toulmin's rhetorical strategy that focuses on three main elements, shown in Table $4.4.5.2$

Table $4.4.5.2$: Toulmin's Three-Part Rhetorical Strategy

Element	Description	Example
1. Claim	Your statement of belief or truth	It is important to spay or neuter your pet.
2. Data	Your supporting reasons for the claim	Millions of unwanted pets are euthanized annually.
3. Warrant	You create the connection between the claim and the supporting reasons	Pets that are spayed or neutered do not reproduce, preventing the production of unwanted animals.

Toulmin's rhetorical strategy is useful in that it makes the claim explicit, clearly illustrating the relationship between the claim and the data, and allows the listener to follow the speaker's reasoning. You may have a good idea or point, but your audience will be curious and want to know how you arrived at that claim or viewpoint. The warrant often addresses the inherent and often unspoken question, "Why is this data so important to your topic?" and helps you illustrate relationships between information for your audience. This model can help you clearly articulate it for your audience.

Argumentation Strategies: GASCAP/T

Here is useful way of organizing and remembering seven key argumentative strategies:

1. Argument by **G**eneralization
2. Argument by **A**nalogy
3. Argument by **S**ign
4. Argument by **C**onsequence
5. Argument by **A**uthority
6. Argument by **P**rinciple
7. Argument by **T**estimony

Richard Fulkerson notes that a single strategy is sufficient to make an argument some of the time, but more common is an effort to combine two or more strategies to increase your powers of persuasion. He organized the argumentative strategies in this way to compare the differences, highlight the similarities, and allow for their discussion. This model, often called by its acronym GASCAP, is a useful strategy to summarize six key arguments and is easy to remember. In Table 4.4.5.4 we have adapted it, adding one more argument that is often used in today's speeches and presentations: the argument by testimony. This table presents each argument, provides a definition of the strategy and an example, and examines ways to evaluate each approach.

Table 4.4.5.3: GASCAP/T Strategies

	Argument by	Claim	Example	Evaluation
G	Generalization	Whatever is true of a good example or sample will be true of everything like it or the population it came from.	If you can vote, drive, and die for your country, you should also be allowed to buy alcohol.	STAR System: For it to be reliable, we need a (S) sufficient number of (T) typical, (A) accurate, and (R) reliable examples.
A	Analogy	Two situations, things or ideas are alike in observable ways and will tend to be alike in many other ways	Alcohol is a drug. So is tobacco. They both alter perceptions, have an impact physiological and psychological systems, and are federally regulated substances.	Watch for adverbs that end in "ly," as they qualify, or lessen the relationship between the examples. Words like "probably," "maybe," "could, "may," or "usually" all weaken the relationship.
S	Sign	Statistics, facts or cases indicate meaning, much like a stop sign means "stop."	Motor vehicle accidents involving alcohol occur at significant rates among adults of all ages in the United States	Evaluate the relationship between the sign and look for correlation, where the presenter says what a facts "means." Does the sign say that? Does is say more, or what is not said? Is it relevant?
C	Cause	If two conditions always appear together, they are causally related.	The U.S. insurance industry has been significantly involved in state and national legislation requiring proof of insurance, changes in graduated driver's licenses, and the national change in the drinking age from age 18 to age 21.	Watch out for "after the fact, therefore because of the fact" (*post hoc, ergo propter hoc*) thinking. There might not be a clear connection, and it might not be the whole picture. Mothers Against Drunk Driving might have also been involved with each example of legislation.

	Argument by	Claim	Example	Evaluation
A	Authority	What a credible source indicates is probably true.	According to the National Transportation and Safety Board, older drivers are increasingly involved in motor vehicle accidents.	Is the source legitimate and is their information trustworthy? Institutes, boards and people often have agendas and distinct points of view.
P	Principle	An accepted or proper truth	The change in the drinking age was never put to a vote. It's not about alcohol, it's about our freedom of speech in a democratic society.	Is the principle being invoked generally accepted? Is the claim, data or warrant actually related to the principle stated? Are there common exceptions to the principle? What are the practical consequences of following the principle in this case?
T	Testimony	Personal experience	I've lost friends from age 18 to 67 to alcohol. It impacts all ages, and its effects are cumulative. Let me tell you about two friends in particular.	Is the testimony authentic? Is it relevant? Is it representative of other's experiences? Use the STAR system to help evaluate the use of testimony.

Evidence

Now that we've clearly outlined several argument strategies, how do you support your position with evidence or warrants? If your premise or the background from which you start is valid, and your claim is clear and clearly related, the audience will naturally turn their attention to "prove it." This is where the relevance of evidence becomes particularly important. Here are three guidelines to consider in order to insure your evidence passes the "so what?" test of relevance in relation to your claim. Make sure your evidence is:

1. **Supportive** Examples are clearly representative, statistics accurate testimony authoritative, and information reliable.
2. **Relevant** Examples clearly relate to the claim or topic, and you are not comparing "apples to oranges."
3. **Effective** Examples are clearly the best available to support the claim, quality is preferred to quantity, there are only a few well-chosen statistics, facts or data.

Appealing to Emotions

While we've highlighted several points to consider when selecting information to support your claim, know that Aristotle strongly preferred an argument based in logic over emotion. Can the same be said for your audience, and to what degree is emotion and your appeal to it in your audience a part of modern life?

Emotions are a psychological and physical reaction, such as fear or anger, to stimuli that we experience as a feeling. Our feelings or emotions directly impact our own point of view and readiness to communicate, but also influence how, why, and when we say things. Emotions influence not only how you say what you say, but also how you hear and what you hear. At times, emotions can be challenging to control. Emotions will move your audience, and possibly even move you, to change or act in certain ways. Marketing experts are famous for creating a need or associating an emotion with a brand or label in order to sell it. You will speak the language of your audience in your document, and may choose to appeal to emotion, but you need to consider the strategic use as a tool that has two edges.

Aristotle indicated the best, and most preferable, way to persuade an audience was through the use of logic, free of emotion. He also recognized that people are often motivated, even manipulated, by the exploitation of their emotions. In our modern context, we still engage this debate, demanding to know the facts separate from personal opinion or agenda, but see the use of emotion used to sell products. If we think of the appeal to emotion as a knife, we can see it has two edges. One edge can cut your audience, and the other can cut you. If you advance an appeal to emotion in your document on spaying and neutering pets, and discuss the millions of unwanted pets that are killed each year, you may elicit an emotional response. If you use this approach repeatedly, your audience may grow weary of it, and it will lose its effectiveness. If you change your topic to the use of animals in research, the same strategy may apply, but repeated attempts at engaging an emotional response may backfire on you, in essence “cutting” you, and produce a negative response, called emotional resistance.

Emotional resistance involves getting tired, often to the point of rejection, of hearing messages that attempt to elicit an emotional response. Emotional appeals can wear out the audience’s capacity to receive the message. As Aristotle outlined, ethos (credibility), logos (logic) and pathos (passion, enthusiasm and emotional response) constitute the building blocks of any document. It’s up to you to create a balanced document, where you may appeal to emotion, but choose to use it judiciously.

On a related point, the use of an emotional appeal may also impair your ability to write persuasively or effectively. If you choose to present an article to persuade on the topic of suicide, and start with a photo of your brother or sister that you lost to suicide, your emotional response may cloud your judgment and get in the way of your thinking. Never use a personal story, or even a story of someone you do not know, if the inclusion of that story causes you to lose control. While it’s important to discuss relevant topics, including suicide, you need to assess you own relationship to the message. Your documents should not be an exercise in therapy and you will sacrifice ethos and credibility, even your effectiveness, if you “lose it” because you are really not ready to discuss the issue.

As we saw in our discussion of Altman and Taylor, most relationships form from superficial discussions and grow into more personal conversations. Consider these levels of self-disclosure when planning your speech to persuade in order to not violate conversational and relational norms.

Now that we’ve outlined emotions and their role in a speech in general and a speech to persuade specifically, it’s important recognize the principles about emotions in communication that serve us well when speaking in public. DeVito offers us five key principles to acknowledge the role emotions play in communication and offer guidelines for their expression.

Emotions Are Universal

Emotions are a part of every conversation or interaction that we have. Whether or not you consciously experience them while communicating with yourself or others, they influence how you communicate. By recognizing that emotions are a component in all communication interactions, we can place emphasis on understanding both the content of the message and the emotions that influence how, why, and when the content is communicated.

The context, which includes your psychological state of mind, is one of the eight basic components of communication. Expression of emotions is important, but requires the three Ts: tact, timing, and trust. If you find you are upset and at risk of being less than diplomatic, or the timing is not right, or you are unsure about the level of trust, then consider whether you can effectively communicate your emotions. By considering these three Ts, you can help yourself express your emotions more effectively.

Emotional Feelings and Emotional Expression Are Not the Same

Experiencing feelings and actually letting someone know you are experiencing them are two different things. We experience feeling in terms of our psychological state, or state of mind, and in terms of our physiological state, or state of our body. If we experience anxiety and apprehension before a test, we may have thoughts that correspond to our nervousness. We may also have an increase in our pulse, perspiration, and respiration (breathing) rate. Our expression of feelings by our body influences our nonverbal communication, but we can complement, repeat, replace, mask, or even contradict our verbal messages. Remember that we can’t tell with any degree of accuracy what other people are feeling simply through observation, and neither can they tell what we are feeling. We need to ask clarifying questions to improve understanding. With this in mind, plan for a time to provide responses and open dialogue after the conclusion of your speech.

Figure 4.4.5.1: Emotions are often communicated through nonverbal gestures and actions. Becky Wetherington – Stress – CC BY 2.0.

Emotions Are Communicated Verbally and Nonverbally

You communicate emotions not only through your choice of words but also through the manner in which you say those words. The words themselves communicate part of your message, but the nonverbal cues, including inflection, timing, space, and paralanguage can modify or contradict your spoken message. Be aware that emotions are expressed in both ways and pay attention to how verbal and nonverbal messages reinforce and complement each other.

Emotional Expression Can Be Good and Bad

Expressing emotions can be a healthy activity for a relationship and build trust. It can also break down trust if expression is not combined with judgment. We're all different, and we all experience emotions, but how we express our emotions to ourselves and others can have a significant impact on our relationships. Expressing frustrations may help the audience realize your point of view and see things as they have never seen them before. However, expressing frustrations combined with blaming can generate defensiveness and decrease effective listening. When you're expressing yourself, consider the audience's point of view, be specific about your concerns, and emphasize that your relationship with your listeners is important to you.

Emotions Are Often Contagious

Have you ever felt that being around certain people made you feel better, while hanging out with others brought you down? When we interact with each other, some of our emotions can be considered contagious. If your friends decide to celebrate, you may get caught up in the energy of their enthusiasm. Thomas Joiner noted that when one college roommate was depressed, it took less than three weeks for the depression to spread to the other roommate (Joiner, T., 1994). It is important to recognize that we influence each other with our emotions, positively and negatively. Your emotions as the speaker can be contagious, so use your enthusiasm to raise the level of interest in your topic. Conversely, you may be subject to "catching" emotions from your audience. Your listeners may have just come from a large lunch and feel sleepy, or the speaker who gave a speech right before you may have addressed a serious issue like suicide. Considering the two-way contagious action of emotions means that you'll need to attend to the emotions that are present as you prepare to address your audience.

Key Takeaway

Everyone experiences emotions, and as a persuasive speaker, you can choose how to express emotion and appeal to the audience's emotions.

Exercises

1. Think of a time when you have experienced emotional resistance. Write two or three paragraphs about your experience. Share your notes with the class.
2. Which is the more powerful, appeal to reason or emotion? Discuss your response with an example.
3. Select a commercial or public service announcement that uses an emotional appeal. Using the information in this section, how would you characterize the way it persuades listeners with emotion? Is it effective in persuading you as a listener? Why or why not? Discuss your findings with your classmates.
4. Find an example of an appeal to emotion in the media. Review and describe it in two to three paragraphs and share with your classmates.

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4.4.6: Speaking Ethically and Avoiding Fallacies

Learning Objectives

1. Demonstrate the importance of ethics as part of the persuasion process.
2. Identify and provide examples of eight common fallacies in persuasive speaking.

What comes to mind when you think of speaking to persuade? Perhaps the idea of persuasion may bring to mind propaganda and issues of manipulation, deception, intentional bias, bribery, and even coercion. Each element relates to persuasion, but in distinct ways. In a democratic society, we would hope that our Bill of Rights is intact and validated, and that we would support the exercise of freedom to discuss, consider and debate issues when considering change. We can recognize that each of these elements in some ways has a negative connotation associated with it. Why do you think that deceiving your audience, bribing a judge, or coercing people to do something against their wishes is wrong? These tactics violate our sense of fairness, freedom, and ethics.

Manipulation involves the management of facts, ideas or points of view to play upon inherent insecurities or emotional appeals to one's own advantage. Your audience expects you to treat them with respect, and deliberately manipulating them by means of fear, guilt, duty, or a relationship is unethical. In the same way, deception involves the use of lies, partial truths, or the omission of relevant information to deceive your audience. No one likes to be lied to, or made to believe something that is not true. Deception can involve intentional bias, or the selection of information to support your position while framing negatively any information that might challenge your belief.

Bribery involves the giving of something in return for an expected favor, consideration, or privilege. It circumvents the normal protocol for personal gain, and again is a strategy that misleads your audience. Coercion is the use of power to compel action. You make someone do something they would not choose to do freely. You might threaten punishment, and people may go along with you while the "stick" is present, but once the threat is removed, they will revert to their previous position, often with new antagonism toward the person or agency that coerced them. While you may raise the issue that the ends justify the means, and you are "doing it for the audience's own good," recognize the unethical nature of coercion.

As Martin Luther King Jr. stated in his advocacy of nonviolent resistance, two wrongs do not make a right. They are just two wrongs and violate the ethics that contribute to community and healthy relationships. Each issue certainly relates to persuasion, but you as the speaker should be aware of each in order to present an ethical persuasive speech. Learn to recognize when others try to use these tactics on you, and know that your audience will be watching to see if you try any of these strategies on them.

Eleven Points for Speaking Ethically

In his book *Ethics in Human Communication* (Johannesen, R., 1996), Richard Johannesen offers eleven points to consider when speaking to persuade. His main points reiterate many of the points across this chapter and should be kept in mind as you prepare, and present, your persuasive message.

Do not:

- use false, fabricated, misrepresented, distorted or irrelevant evidence to support arguments or claims.
- intentionally use unsupported, misleading, or illogical reasoning.
- represent yourself as informed or an "expert" on a subject when you are not.
- use irrelevant appeals to divert attention from the issue at hand.
- ask your audience to link your idea or proposal to emotion-laden values, motives, or goals to which it is actually not related.
- deceive your audience by concealing your real purpose, by concealing self-interest, by concealing the group you represent, or by concealing your position as an advocate of a viewpoint.
- distort, hide, or misrepresent the number, scope, intensity, or undesirable features of consequences or effects.
- use "emotional appeals" that lack a supporting basis of evidence or reasoning.
- oversimplify complex, gradation-laden situations into simplistic, two-valued, either-or, polar views or choices.
- pretend certainty where tentativeness and degrees of probability would be more accurate.
- advocate something which you yourself do not believe in.

Aristotle said the mark of a good person, well spoken was a clear command of the faculty of observing in any given case the available means of persuasion. He discussed the idea of perceiving the many points of view related to a topic, and their thoughtful consideration. While it's important to be able to perceive the complexity of a case, you are not asked to be a lawyer defending a client.

In your speech to persuade, consider honesty and integrity as you assemble your arguments. Your audience will appreciate your thoughtful consideration of more than one view, your understanding of the complexity, and you will build your ethos, or credibility, as you present your document. Be careful not to stretch the facts, or assemble them only to prove yourself, and instead prove the argument on its own merits. Deception, coercion, intentional bias, manipulation and bribery should have no place in your speech to persuade.

Avoiding Fallacies

Fallacies are another way of saying false logic. These rhetorical tricks deceive your audience with their style, drama, or pattern, but add little to your speech in terms of substance and can actually detract from your effectiveness. There are several techniques or "tricks" that allow the speaker to rely on style without offering substantive argument, to obscure the central message, or twist the facts to their own gain. Here we will examine the eight classical fallacies. You may note that some of them relate to the ethical cautions listed earlier in this section. Eight common fallacies are presented in Table $4.4.6.5$. Learn to recognize these fallacies so they can't be used against you, and so that you can avoid using them with your audience.

Table 4.4.6.5: Fallacies

Fallacy	Definition	Example
1. Red Herring	Any diversion intended to distract attention from the main issue, particularly by relating the issue to a common fear.	It's not just about the death penalty; it's about the victims and their rights. You wouldn't want to be a victim, but if you were, you'd want justice.
2. Straw Man	A weak argument set up to be easily refuted, distracting attention from stronger arguments	What if we released criminals who commit murder after just a few years of rehabilitation? Think of how unsafe our streets would be then!
3. Begging the Question	Claiming the truth of the very matter in question, as if it were already an obvious conclusion.	We know that they will be released and unleashed on society to repeat their crimes again and again.
4. Circular Argument	The proposition is used to prove itself. Assumes the very thing it aims to prove. Related to begging the question.	Once a killer, always a killer.
5. Ad Populum	Appeals to a common belief of some people, often prejudicial, and states everyone holds this belief. Also called the Bandwagon Fallacy, as people "jump on the bandwagon" of a perceived popular view.	Most people would prefer to get rid of a few "bad apples" and keep our streets safe.
6. Ad Hominem	"Argument against the man" instead of against his message. Stating that someone's argument is wrong solely because of something about the person rather than about the argument itself.	Our representative is a drunk and philanderer. How can we trust him on the issues of safety and family?
7. Non Sequitur	"It does not follow." The conclusion does not follow from the premises. They are not related.	Since the liberal antiwar demonstrations of the 1960s, we've seen an increase in convicts who got let off death row.
8. Post Hoc Ergo Propter Hoc	"After this, therefore because of this," also called a coincidental correlation. It tries to establish a cause-and-effect relationship where only a correlation exists.	Violent death rates went down once they started publicizing executions.

Avoid false logic and make a strong case or argument for your proposition. Finally, here is a five-step motivational checklist to keep in mind as you bring it all together:

1. Get their attention

2. Identify the need
3. Satisfy the need
4. Present a vision or solution
5. Take action

This simple organizational pattern can help you focus on the basic elements of a persuasive message when time is short and your performance is critical.

Key Takeaway

Speaking to persuade should not involve manipulation, coercion, false logic, or other unethical techniques.

Exercises

1. Can persuasion be ethical? Why or why not? Discuss your opinion with a classmate.
2. Select a persuasive article or video from a Web site that you feel uses unethical techniques to persuade the audience. What techniques are being used? What makes them unethical? Discuss your findings with your classmates.
3. Find an example of a particularly effective scene where a character in your favorite television program is persuaded to believe or do something. Write a two- to three-paragraph description of the scene and why it was effective. Share and compare with classmates.
4. Find an example of a particularly ineffective scene where a character in your favorite television program is not persuaded to believe or do something. Write a two- to three-paragraph description of the scene and why it was ineffective. Share and compare with classmates.
5. Find an example of a fallacy in an advertisement and share it with the class.
6. Find an example of an effective argument in an advertisement and share it with the class.
7. Write a two- to three-paragraph description of a persuasive message that caused you to believe or do something. Share and compare your description with classmates.

References

Johannesen, R. (1996). *Ethics in human communication* (4th ed.). Prospect Heights, IL: Waveland Press.

4.4.7: Sample Persuasive Speech

Learning Objectives

1. Understand the structural parts of a persuasive speech.

Here is a generic, sample speech in an outline form with notes and suggestions.

Attention Statement

Show a picture of a person on death row and ask the audience: does an innocent man deserve to die?

Introduction

Briefly introduce the man in an Illinois prison and explain that he was released only days before his impending death because DNA evidence (not available when he was convicted), clearly established his innocence.

A statement of your topic and your specific stand on the topic:

"My speech today is about the death penalty, and I am against it."

Introduce your credibility and the topic: "My research on this controversial topic has shown me that deterrence and retribution are central arguments for the death penalty, and today I will address each of these issues in turn."

State your main points.

"Today I will address the two main arguments for the death penalty, deterrence and retribution, and examine how the governor of one state decided that since some cases were found to be faulty, all cases would be stayed until proven otherwise."

Body

Information: Provide a simple explanation of the death penalty in case there are people who do not know about it. Provide clear definitions of key terms.

Deterrence: Provide arguments by generalization, sign, and authority.

Retribution: Provide arguments by analogy, cause, and principle.

Case study: State of Illinois, Gov. George Ryan. Provide an argument by testimony and authority by quoting: "You have a system right now…that's fraught with error and has innumerable opportunities for innocent people to be executed," Dennis Culloton, spokesman for the Governor, told the *Chicago Tribune*. "He is determined not to make that mistake."

Solution steps:

1. *National level*. "Stay all executions until the problem that exists in Illinois, and perhaps the nation, is addressed."
2. *Local level*. "We need to encourage our own governor to examine the system we have for similar errors and opportunities for innocent people to be executed."
3. *Personal level*. "Vote, write your representatives, and help bring this issue to the forefront in your community."

Conclusion

Reiterate your main points and provide synthesis; do not introduce new content.

Residual Message

Imagine that you have been assigned to give a persuasive presentation lasting five to seven minutes. Follow the guidelines in Table 4.4.7.1and apply them to your presentation.

Table 4.4.7.1: Sample Speech Guidelines

1.Topic	Choose a product or service that interests you so much that you would like to influence the audience's attitudes and behavior toward it.

2. Purpose	Persuasive speakers may plan to secure behavioral changes, influence thinking, or motivate action in their audience. They may state a proposition of fact, value, definition, or policy. They may incorporate appeals to reason, emotion, and/or basic needs.
3. Audience	Think about what your audience might already know about your topic and what they may not know, and perhaps any attitudes toward or concerns about it. Consider how this may affect the way that you will present your information. You won't be able to convert everyone in the audience from a "no" to a "yes," but you might encourage a couple to consider "maybe." Audiences are more likely to change their behavior if it meets their needs, saves them money, involves a small change, or if the proposed change is approached gradually in the presentation.
4. Supporting Materials	Using the information gathered in your search for information, determine what is most worthwhile, interesting, and important to include in your speech. Time limits will require that you be selective about what you use. Consider information that the audience might want to know that contradicts or challenges your claims and be prepared for questions. Use visual aids to illustrate your message.
5. Organization	1. Write a central idea statement, which expresses the message, or point, that you hope to get across to your listeners in the speech. 2. Determine the two to three main points that will be needed to support your central idea. 3. Prepare a complete sentence outline of the body of the speech, including solution steps or action items.
6. Introduction	Develop an opening that will 1. get the attention and interest of your listeners, 2. express your central idea/message, and 3. lead into the body of your speech.
7. Conclusion	The conclusion should review and/or summarize the important ideas in your speech and bring it to a smooth close.
8. Delivery	The speech should be delivered extemporaneously, using speaking notes and not reading from the manuscript. Work on maximum eye contact with your listeners. Use any visual aids or handouts that may be helpful.

Key Takeaway

A speech to persuade presents an attention statement, an introduction, the body of the speech with main points and supporting information, a conclusion, and a residual message.

Exercises

1. Apply this framework to your persuasive speech.
2. Prepare a three- to five-minute presentation to persuade and present it to the class.
3. Review an effective presentation to persuade and present it to the class.
4. Review an ineffective presentation to persuade and present it to the class

4.4.8: Elevator Speech

Learning Objectives

1. Discuss the basic parts of an elevator speech.
2. Create an effective elevator speech.

An elevator speech is to oral communication what a Twitter message (limited to 280 characters) is to written communication. It has to engage and interest the listener, inform and/or persuade, and be memorable (Howell, L., 2006). An elevator speech is a presentation that persuades the listener in less than thirty seconds, or around a hundred words. It takes its name from the idea that in a short elevator ride (of perhaps ten floors), carefully chosen words can make a difference. In addition to actual conversations taking place during elevator rides, other common examples include the following:

- An entrepreneur making a brief presentation to a venture capitalist or investor
- A conversation at the water cooler
- Comments during intermission at a basketball game
- A conversation as you stroll across the parking lot

Creating an Elevator Speech

An elevator speech does not have to be a formal event, though it can be. An elevator speech is not a full sales pitch and should not get bloated with too much information. The idea is not to rattle off as much information as possible in a short time, nor to present a "canned" thirty-second advertising message, but rather to give a relaxed and genuine "nutshell" summary of one main idea. The speech can be generic and nonspecific to the audience or listener, but the more you know about your audience, the better. When you tailor your message to that audience, you zero in on your target and increase your effectiveness (Albertson, E., 2008). The emphasis is on brevity, but a good elevator speech will address several key questions:

1. What is the topic, product or service?
2. Who are you?
3. Who is the target market? (if applicable)
4. What is the revenue model? (if applicable)
5. What or who is the competition and what are your advantages?

Table 4.4.8.1adapts the five parts of a speech to the format of the elevator speech.

Table 4.4.8.1 Parts of an Elevator Speech

Speech Component	Adapted to Elevator Speech
Attention Statement	Hook + information about you
Introduction	What you offer
Body	Benefits; what's in it for the listener
Conclusion	Example that sums it up
Residual Message	Call for action

Example:

1. How are you doing?
2. Great! Glad you asked. I'm with (X Company) and we just received this new (product x)—it is amazing. It beats the competition hands down for a third of the price. Smaller, faster, and less expensive make it a winner. It's already a sales leader. Hey, if you know anyone who might be interested, call me! (Hands business card to the listener as visual aid)

Key Takeaway

You often don't know when opportunity to inform or persuade will present itself, but with an elevator speech, you are prepared!

Exercises

1. Pick a product or service and prepare an elevator speech (less than a hundred words, no more than thirty seconds). Rehearse the draft out loud to see how it sounds and post or present it in class.
2. Find an example of an elevator speech online (YouTube, for example) and review it. Post the link and a brief summary of strengths and weaknesses. Share and compare with classmates.
3. Prepare an elevator speech (no more than thirty seconds) and present to the class.

References

Albertson, E. (2008). *How to open doors with a brilliant elevator speech*. New Providence, NJ: R. R. Bowker.

Howell, L. (2006). *Give your elevator speech a lift*. Bothell, WA: Publishers Network.

4.4.9: Additional Resources

Robert Cialdini, author of *Influence: The Psychology of Persuasion*, asks, “Which messages spur citizens to protect the environment?” January 25, 2007, at the Royal Society for the encouragement of Arts, Manufactures and Commerce (RSA); free downloads of MP3 and PDF transcripts are available. www.thersa.org/discover/audio/2014/09/small-changes-to-make-a-big-difference/

Justthink.org promotes critical thinking skills and awareness of the impact of images in the media among young people. www.change.org/organizations/just_think_foundation

Watch a YouTube video of a persuasive speech on becoming a hero. http://www.youtube.com/watch?v=KYtm8uEo5vU

Watch a YouTube video of a persuasive speech on same-sex marriage. http://www.youtube.com/watch?v=cR4N8oEQR3c&feature=related

Professional speaker Ruth Sherman speaks persuasively about her book, *Get Them to See It Your Way, Right Away*. www.ruthsherman.com/video.asp

Visit this site for a video and other resources about Maslow’s hierarchy of needs. www.abraham-maslow.com/m_motivation/Hierarchy_of_Needs.asp

Read an informative article on negotiating face-to-face across cultures by Stella Ting-Toomey, . www.sfu.ca/davidlamcentre/forum/past_PRF/PRF_1999/intercultural-conflict-competence-eastern-and-western-lenses.html

Purdue University’s Online Writing Lab (OWL) provides a guide to persuasive speaking strategies. http://owl.english.purdue.edu/owl/resource/588/04

Visit the Web site of talk show host Sean Hannity and assess his persuasive speaking techniques. http://www.hannity.com

Visit the Web site of National Public Radio and assess the persuasive message of various radio programs. http://www.npr.org

SECTION OVERVIEW

4.5: Business Presentations in Action

Thumbnail: www.pexels.com/photo/man-holding-microphone-while-talking-to-another-man-2872418/

4.5.1: Sound Bites and Quotables

Learning Objectives

1. Discuss elements that make a sound bite effective.
2. Choose a sound bite or quote from a written or verbal message.
3. Prepare a quote that is memorable.

Sometimes the words with the most impact are succinct, memorable statements. Sound bites, brief statements that zero in on the point of a larger or longer message, are often excised from interviews and articles, and presented apart from the context in which they were originally written or spoken. Slogans are phrases that express the goals, aims or nature of a product, service, person, or company. Quotes are memorable sayings extracted from written or verbal messages. Some move armies, while others make armies laugh. All are memorable and quickly become part of our cultural literacy, expressing a common sentiment or perception, and reinforcing our image of the speaker, business, product, or service (Taylor, I., 2004).

Common Elements of Effective Sound Bites

Whether you are writing a document, preparing a presentation, or both, you will want to consider how others will summarize your main point. If you can provide a clear sound bite or quote, it is more likely to get picked up and repeated, reinforcing your message. By preparing your sound bites, you help control the interpretation of your message (Kerchner, K., 1997). Here are four characteristics of effective sound bites:

1. Clear and concise
2. Use vivid, dynamic language
3. Easy to repeat
4. Memorable

Your goal when writing a sound bite or quote is to make sure your idea represents all four characteristics. You won't always be creating the message; in some cases you may be asked to summarize someone else's written or verbal message, such as an interview, with a quote or a sound bite. Look for one or more sentences or phrases that capture these elements and test them out on your classmates or colleagues. Can the sound bite, slogan, or quote be delivered without stumbling? Is it easy to read? Does it get the job done?

Key Takeaway

Sound bites are brief statements that are often quoted.

Exercises

1. Choose a product or service that you find appealing. Try to come up with several sound bites, slogans, or quotes that meet all four criteria. You may look to company sales materials or interviews as a source for this exercise, and if you pull a quote from an online interview, please post the link when you complete your assignment. Discuss how the sound bite, slogan, or quote meets all four criteria in your response.
2. Match these phrases with their sources.

Product, Business or Person	Sound Bite, Slogan, or Memorable Quote
A. Nike	1. Where's the beef?
B. Barack Obama	2. Ask not what your country can do for you, but what you can do for your country.
C. Homer Simpson	3. Huge. That's huge, or huge.
D. Wendy's	4. Just do it!
E. John F. Kennedy	5. It's amazing how much you can get done when you're not trying to take credit for it.
F. Neil Armstrong	6. D'oh!

Product, Business or Person	Sound Bite, Slogan, or Memorable Quote
G. Paris Hilton	7. That's one small step for a man; one giant leap for mankind.
H. Franklin D. Roosevelt	8. A diamond is forever.
I. De Beers Consolidated	9. The only thing we have to fear is fear itself.

Answers: A-4, B-5, C-6, D-1, E-2, F-7, G-3, H-9, I-8

3. Indicate at least one sound bite or memorable quote and who said it. Please share your results with classmates and compare your results.

References

Kerchner, K. (1997). *Soundbites: A business guide for working with the media*. Superior, WI: Savage Press.

Taylor, I. (2004). *Mediaspeak: Strategy. Sound-Bites. Spin: The plain-talking guide to issures, reptuation and message management*. Toronto, Canada: Hushion House Publishing.

4.5.2: Telephone/VoIP Communication

Learning Objectives

1. Demonstrate the five stages in a telephone conversation.
2. Understand delivery strategies to increase comprehension and reduce misunderstanding.

Talking on the phone or producing an audio recording lacks an interpersonal context with the accompanying nonverbal messages. Unless you use vivid language, crisp, and clear descriptions, your audience will be left to sort it out for themselves. They may create mental images that don't reflect your intention that lead to miscommunication. Conversations follow predictable patterns and have main parts or stages we can clearly identify. While not every conversation is the same, many will follow a variation of a standard pattern composed by David Taylor and Alyse Terhune:

1. Opening
2. Feedforward
3. Business
4. Feedback
5. Closing

Table 4.5.2.1[1] provides an example of how a conversation might go according to these five stages.

Table 4.5.2.1 A Five-Stage Telephone Conversation

Stage	Subevents	Example
Opening	• Both parties identify themselves • Greetings are reciprocated	• [phone rings] • Ken: Hello, Ken Reilly. • Val: Hi, Ken. This is Val Martin from [company or department]. How are you? • Ken: Fine, and you? • Val: Fine, I'm doing great.
Feedforward	• Purpose and tone of conversation are established • Permission is given to continue (or not)	• Val: I hate to bother you, but I wonder if you have five minutes to give me some advice. • Ken: Sure, Val. What's happening? • [or: I'm tied up right now. Can I call you back in an hour?]
Business	• Substance of conversation • Parties exchange roles	• Val: Here's the situation. [explains] I know you are good at resolving these kinds of issues, so I was wondering what you think I should do. • Ken: Wow, I can understand how this has you concerned. Considering what you've told me, here's what I think I would do. [explains]
Feedback	• Signal that business is concluded	• Val: Hmm, that makes sense. I'll certainly keep your ideas in mind. Thank you so much, Ken! • Ken: Hey, you're welcome. Let me know how it turns out.
Closing	• Both parties say goodbye	• Val: Yes, I will. Have a good weekend, Ken. • Ken: You too, Val. Bye. • Val: Bye. • [they hang up]

Cell phones are a part of many, if not most, people’s lives in the industrialized world and, increasingly, in developing nations as well. Computer users can also utilize voice interaction and exchange through voice over Internet protocol (VoIP) programs like Skype. With the availability of VoIP, both audio and visual images are available to the conversation participants. But in our discussion, we’ll focus primarily on voice exchanges.

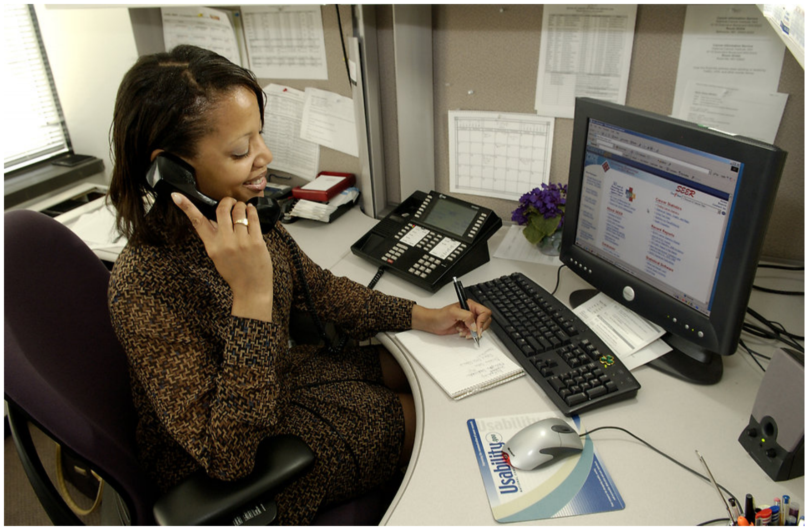

Figure 4.5.2.1: Telephone conversations in business require skill and preparation. Bill Branson – Business Woman – public domain.

Since you lack the nonverbal context, you need to make sure that your voice accurately communicates your message. Your choice of words and how you say them, including spacing or pausing, pace, rhythm, articulation, and pronunciation are relevant factors in effective delivery. Here are five main points to consider:

1. Speak slowly and articulate your words clearly.
2. Use vivid terms to create interest and communicate descriptions.
3. Be specific.
4. Show consideration for others by keeping your phone conversations private.
5. Silence cell phones, pagers, and other devices when you are in a meeting or sharing a meal with colleagues.

You don’t have to slow down your normal pattern of speech by a large degree, but each word needs time and space to be understood or the listener may hear words that run together, losing meaning and creating opportunities for misunderstanding. Don’t assume that they will catch your specific information the first time and repeat any as necessary, such as an address or a phone number.

Feedback, the response from the receiver to the sender, is also an essential element of phone conversations. Taking turns in the conversation can sometimes be awkward, especially if there is an echo or background noise on the line. With time and practice, each “speaker’s own natural, comfortable, expressive repertoire will surface” *Mayer, K., 1980).

Key Takeaway

A telephone conversation typically includes five stages: opening, feedforward, business, feedback, and closing. Because telephone conversations lack nonverbal cues, they require additional attention to feedback.

Exercises

1. Write an outline of a script for a telephone conversation that introduces a new product or service to an existing client. Partner with a classmate to role-play the conversation and note points that could use improvement. Compare your results with classmates.
2. Think of a phone conversation you had recently. Write a brief summary and include at least one example of what worked or what did not. Share and compare with classmates.
3. Take notes during a telephone conversation and write a brief description, labeling the parts of the conversation and providing examples. Share and compare with classmates.

[1]Adapted from Taylor, D., & Terhune, A. D. (2000). Doing e-business: Strategies for thriving in an electronic marketplace. New York, NY: John Wiley & Sons. Retrieved from www.wiley.com/WileyCDA/WileyTitle/productCd-0471380652.html.

References

Mayer, K. (1980). Developing delivery skills in aral business communication. *Business Communication Quarterly, 43*(3), 21–24.

Taylor, D., & Terhune, A. D. (2000). Doing e-business: Strategies for thriving in an electronic marketplace. New York, NY: John Wiley & Sons. Retrieved from www.wiley.com/WileyCDA/WileyTitle/productCd-0471380652.html.

4.5.3: Meetings

Learning Objectives

- Discuss meetings and their role in business communication.
- Describe the main parts of an agenda.
- Discuss several strategies for effective meetings.

A meeting is a group communication in action around a defined agenda, at a set time, for an established duration. Meetings can be effective, ineffective, or a complete waste of time. If time is money and effectiveness and efficiency are your goals, then if you arrange a meeting, lead a meeting, or participate in one, you want it to be worth your time (Mosvick, R. K., 1996).

Figure 4.5.3.2: Meetings are group communications in action around a defined agenda, at a set time, for an established duration. Baltic Development Forum – Kristovskis-meeting-94 – CC BY 2.0.

Meetings can occur face-to-face, but increasingly business and industry are turning to teleconferencing and videoconferencing options as the technology improves, the cost to participate is reduced, and the cost of travel including time is considered. Regardless how you come together as a team, group, or committee, you will need to define your purpose in advance with an agenda (Deal, T., and Kennedy, A., 1982). The main parts of an agenda for a standard meeting are listed in Table 4.5.3.1.

Table 4.5.3.1: Meeting Agenda Elements

Term	Definition
Title Header	Title, time, date, location, phone number, e-mail contact, and any other information necessary to get all participants together.
Participants	Expected participants
Subject Line	Purpose statement
Call to Order	Who will call the meeting to order?
Introductions	If everyone is new, this is optional. If even one person is new, everyone should briefly introduce themselves with their name and respective roles.
Roll Call	This may quietly take place while introductions are made.
Reading of the minutes	Notes from the last meeting are read (if applicable) with an opportunity to correct. These are often sent out before the meeting so participants have the opportunity to review them and note any needed corrections.

Term	Definition

Term	Definition
Old Business	List any unresolved issues from last time or issues that were “tabled,” or left until this meeting.
New Business	This is a list of items for discussion and action.
Reports	This is optional and applies if there are subcommittees or groups working on specific, individual action items that require reports to the group or committee.
Good of the Order	This is the time for people to offer any news that relates to the topic of the meeting that was otherwise not shared or discussed.
Adjournment	Note time, date, place meeting adjourned and indicate when the next meeting is scheduled.

Strategies for Effective Meetings

You want an efficient and effective meeting, but recognize that group communication by definition can be chaotic and unpredictable. To stay on track, consider the following strategies:

- Send out the last meeting’s minutes one week before the next meeting.
- Send out the agenda for the current meeting at least one week in advance.
- Send out reminders for the meeting the day before and the day of the meeting.
- Schedule the meeting in Outlook or a similar program so everyone receives a reminder.
- Start and end your meetings on time.
- Make sure the participants know their role and requirements prior to the meeting.
- Make sure all participants know one another before discussion starts.
- Formal communication styles and reference to the agenda can help reinforce the time frame and tasks.
- Follow Robert’s Rules of Order when applicable, or at least be familiar with them.
- Make sure notes taken at the meeting are legible and can be converted to minutes for distribution later.
- Keep the discussion on track, and if you are the chair, or leader of a meeting, don’t hesitate to restate a point to interject and redirect the attention back to the next agenda point.
- If you are the chair, draw a clear distinction between on-topic discussions and those that are more personal, individual, or off topic.
- Communicate your respect and appreciation for everyone’s time and effort.
- Clearly communicate the time, date, and location or means of contact for the next meeting.

Key Takeaway

With good planning and preparation, meetings can be productive, engaging, and efficient.

Exercise

1. Create a sample agenda for a business meeting to discuss the quarterly sales report and results from the latest marketing campaign. Decide what information is needed, and what position might normally be expected to produce that information. Note in your agenda all the elements listed above, even if some elements (such as “good of the order”) only serve as a placeholder for the discussion that will take place.
2. Write a brief description of a meeting you recently attended and indicate one way you perceived it as being effective. Compare with classmates.
3. Write a brief description of a meeting you recently attended and indicate one way you perceived it as being ineffective. Compare with classmates.

References

Mosvick, R. K. (1996). *We’ve got to start meeting like this: A guide to successful meeting management*. New York, NY: Park Avenue Productions.

Deal, T., & Kennedy, A. (1982). *Corporate cultures: The rites and rituals of corporate life*. Reading, MA: Addison-Wesley Publishing Company, Inc.

4.5.4: Celebrations - Toasts and Roasts

Learning Objectives

1. Discuss the role, function, and importance of a toast.
2. Discuss the elements of an effective toast.

Toasts are formal expressions of goodwill, appreciation, or calls for group attention to an issue or person in a public setting, often followed by synchronous consumption of beverages. Examples often include a toast at a wedding congratulating the couple, toasts at a bar after a tournament win to congratulate the team or an individual player, or a general toast to health for everyone on a holiday or other special occasion.

Toasts serve to unify the group, acknowledge a person or event, mark a special occasion, or simply to encourage the consumption of alcohol. These can range from serious to silly but are normally words that point out something that is commonly known. For example, a toast to the most valuable player in a game may serve to publicly acknowledge him or her for achievements that are already known by the community. The verbal recognition, followed by ritualistic drinking, serves as a public acknowledgement. Belonging is a basic human need that requires reinforcement, and a toast can be characterized as a reinforcement ritual, acknowledging respect for the individual or team, and also reinforcing group affiliation, common symbols and terms, beliefs and values, goals and aspirations (McLean, S., 2005).

Toasts, while common in many societies, are relatively rare in daily life. They are normally associated with informal and formal gatherings of the group, team, or community. Since you may only perform a couple of toasts in your lifetime, you no doubt want to get them right the first time. We will address toasts and one variation in particular, the roast.

Proposing a Toast

One proposes a toast, rather than "making" a toast or simply "toasting," because for it to truly be a toast, everyone in the group, team, or community must participate. If you propose a toast to someone and no one responds, even if you raise your glass to them as a nonverbal sign or respect and take a sip, it doesn't count as a toast. Only the community can publicly acknowledge someone with a toast, but it takes an individual to make the proposition.

Sometimes the person who is supposed to make that proposition is already known by function or role. The best man and maid of honor at a wedding, the host of a party, and the highest-ranking manager at a business meal are common roles that are associated with ritualistic toasts.

Standing with proper posture to address the group is normally associated with acts of public speaking, including toasts. If you are understood to be a person who will be proposing a toast, you may not need to say anything to get the group's attention. As you rise and raise your glass, the room will grow quiet in anticipation of your words. If the group does not expect you to propose a toast, you may need to say, "May I propose a toast?" in a voice above the level of the group. Nonverbal displays also work to capture attention (McLean, S., 2005), such as standing on a chair. While that may be nonstandard, your context will give you clues about how best to focus attention. Striking a glass with spoon to produce a ring, while common, is sometimes considered less than educated and a poor reflection of etiquette. The group norms determine what is expected and accepted, and it may be a custom that is considered normal. Etiquette is a conventional social custom or rule for behavior, but social customs and rules for behavior vary across communities and cultures.

You will raise your glass, raise your voice, and make a brief statement complimenting the person being honored. Your toast should be brief. If you write it out in advance, use thirty words as your upper limit. Common mistakes are for toast-givers to ramble on too long and to talk about themselves instead of the honoree. The toast is not as much about the words you use, though they carry weight and importance, but it's about the toast ritual as a group expression of acknowledgement and respect. People then raise their glasses to indicate agreement, often repeating "hear, hear!" or a word or phrase from the toast, such as "to success!" They then sip from their cup, possibly touching glasses first.

One common toast that always serves to unify the group is the toast to health. To propose a toast to health is common, well understood, and serves both the role and function of a toast. "Live long and prosper" is a common variation of "to your health" in English. Table $4.5.4.1$lists toasts to health in other languages.

Table $4.5.4.3$ Toasts to Health

Language	Toast
Chinese	Wen lie
French	A votre santé
Gaelic	Sláinte
German	Zum Wohl
Greek	Stin ygia sou
Hebrew	L’chiam
Italian	Alla salute
Japanese	Kanpai
Polish	Na zdrowie
Portuguese	Saúde
Spanish	Salud

Sometimes a best man at a wedding will be expected to tell a short story as part of their toast. A common story is how the couple met from the best man’s perspective. While this may be your choice, remember to keep it quite brief, positive, and focused on the honorees, not on yourself. Important occasions require you to play your part like everyone else, and your role is to focus attention on the individual, team, couple, or group as you honor them.

Alcohol is not a requirement for a toast, nor is draining one’s glass. The beverage and the quantity to be swallowed are a reflection of group norms and customs. Often alternatives, such as nonalcoholic sparkling cider, are served. If you are expected to perform a toast, one that requires tact, grace, and a clear presence of mind, you should refrain from drinking alcohol until after you’ve completed your obligation. Your role has responsibilities, and you have a duty to perform.

Roasts

Roasts are public proclamations that ridicule or criticize someone to honor them. That may sound awkward at first, but consider the targets most commonly associated with roasts: those in positions of power or prestige. Knocking someone off their pedestal is a special delight for the group or community, but it requires special care and attention to social dynamics, sensitivities, rank, and roles.

A common context for a round of roasts, or a series or public statements intended to poke fun at someone, is at a retirement party. Individuals in the room tell brief stories that may have some basis in truth, but which through word choice and clear communication of exaggeration, allow everyone to look back upon the episode with light humor and laughter. Time has passed and the absurd is worthy of group laughter.

A roast is not an opportunity to say something mean. If you don’t think the target will laugh it off, don’t say it. Roasts can hurt feelings, and that misses the point. A roast honors someone in a position of power or influence by allowing them to demonstrate they can take a joke at their own expense gracefully. It is not intended to do harm to the individual or create divisions in the community. Ritual public speaking is supposed to unify groups, teams, and communities, and not create division or rival internal groups.

Key Takeaway

Toasts and roasts honor a member of the community.

Exercises

1. You are called upon to propose a toast to your team leader after your group has just completed a large contract. Work on this project wasn’t always easy, but now is the time for celebration and recognition. Write a sample toast in no more than thirty words. Compare your results with your classmates.
2. What should someone propose a toast to? How should they propose it? Write your response and include an example. Compare with classmates.

3. If you were the subject of a roast, what would you feel comfortable having people say, do, or show to make fun of you in public? Write your response and include an example. Compare with classmates.

References

McLean, S. (2005). *The basics of interpersonal communication*. Boston, MA: Allyn & Bacon.

4.5.5: Media Interviews

Learning Objectives

1. Discuss the purpose of the media interview.
2. Understand ways to prepare for the media interview.

At some point in your business career it's likely that you will be interviewed by a representative of the media. It may be a camera and microphone in your face as you leave a building, or a scheduled interview where you have an opportunity to prepare. A press interview is both a challenge and an opportunity. Like a speech, it may make you nervous, but you have the advantage of being the center of attention and having the opportunity to have your say. This chapter addresses the basics for preparing and participating in a press interview.

A media interview is a discussion involving questions and answers for the purpose of broadcast. It is distinct from an informational interview (McLean, S., 2005), where you might be asked questions to learn background on a story, but you will still need to observe the three hallmark rules of interviews:

1. Anything you say can and often will be used against you.
2. Never say anything you would not feel comfortable hearing quoted out of context on the evening news.
3. Be prepared for the unexpected as well as the expected.

At first, those rules may sound extreme, but let's examine them in the context of today's media realities. In a press interview setting you will be recorded in some fashion, whether audio, video, or handwritten notes on a reporter's notepad. With all the probability for errors and misinterpretation, you want your words and gestures to project the best possible image to the press. There was a time when news programs didn't have to justify themselves with advertising dollars, but today all news is news entertainment and has to pay its own way. That means your interview will be used to attract viewers. You also have to consider the possibility that the person interviewing you is not a trained professional journalist, but rather an aspiring actor or writer who happened to land a job with the media. From their perspective, your quote in an audio, video, or print content package is dinner. It may also serve the public good, and inform, or highlight an important cause, but news has a bottom line just like business.

Because of these factors, you need to be proactive in seeing the press interview as part of the overall spectacle that is media, devoted to revenue. The six-second quote that is taken from the interview may not represent the tone, range, or even substance of your comments, but it will have been chosen to grab attention. It will also go viral if it catches on. Your interviewer may ask you a question that is off-the-wall, inappropriate, outside the scope of the interview, or unusual just to catch you off guard and get that attention-worthy quote. Independent journalism with a nonprofit, inform-the-public orientation still exists in some forms, but even those media outlets have to support themselves with an audience. So consider your role in the interview: to provide information and represent your business or organization with honor and respect. In sports, business, and press interviews, a good defense is required.

That said, a press interview is a positive opportunity, whether it is planned in advance or catches you off guard in public. You are the focus of the interview, and many people believe that if you are on television, for example, that you have something to say, that you have special insight, or that you are different from the viewing audience. That can give you an edge of credibility that can serve your business or company as you share your knowledge and experience.

When asked to give an interview, before you agree, learn as much as you can about the topic, the timing, the format, and the background. Table 4.5.5.1summarizes how to approach these factors.

Table 4.5.5.1 Interview Preparation Factors

Topic	What will be the range or scope of the interview? How can you prepare yourself so you are better able to address specific questions? Ask for the list of questions in advance, and anticipate that you will be asked questions that are not listed. Prepare for the unexpected and you won't be caught off guard.
Time	What's the time frame or limit? A 15-minute interview may not require as much depth as one that lasts an hour or more.
Format	How will you be interviewed? Will it be through audio or video, over the Internet, over the telephone, or in person?

Background	What's the backstory on the interview? Is there a specific issue or incident? Is there a known agenda? Why is the interview now and not earlier or not at all? Why is it important?

These four areas will serve you well as you begin to define the range and content of the interview for yourself. You will also need to pay attention to the setting and scene, how you want to present yourself (dress or suit?), and how well you answer anticipated questions. Mock interviews with colleagues can help, and a comprehensive knowledge of your talking points is essential.

You want to be well rested, if at all possible, on the day of the interview. With a clear mind you will be agile and responsive, and you will be able to present yourself well. You'll be calm in the knowledge of your preparation, and not be thrown if an unexpected question comes your way. You'll be ready on time, understanding that most journalists have to package the story as quickly as possible, demonstrating respect for the interviewer. You'll also know that it is not just about what you say but how you say it. Audiences respond to emotional cues, and you want to project an image of credibility and integrity. You'll anticipate the question-and-answer pattern and limit your responses to ones that are clear and concise. You'll have visual aids ready if needed to make a point.

Naturally, however, you may not have the luxury of time to prepare. Press interviews are often requested at the last minute, and you may not be the first person this reporter asked for an interview that day. They have a story in mind, and they are looking for you to be part of that story. If the opportunity to be interviewed arises on the spur of the moment, you will need to make a quick judgment on whether to agree or decline. Your decision will rest on a multitude of factors, such as how much you know about the topic, whether someone else in your organization is better qualified to answer, whether your employer would appreciate your agreeing to speak to the media, and so on. If something newsworthy occurs at your workplace, start thinking about how you would make this decision before you are put on the spot. Finally, if the topic of the media inquiry is not time urgent, remember that you can always ask to postpone the interview to allow time to prepare.

Key Takeaway

A press interview is both a challenge and an opportunity.

Exercises

1. How does the press interview serve the business or organization? List two ways and provide examples. Discuss your ideas with classmates.

2. Consider the following scenario. Your large company is opening a new office in a new town and you have been designated to be part of the team that will be on the front lines. You want to establish goodwill, but also recognize that, being an outsider, you and your company may not be welcomed with open arms by the local business community. Your company produces a product and provides a service (feel free to choose; a coffee shop for example) that is currently offered in the town, but your organization perceives room for market growth as well as market share. Describe how you would handle relations with the local media. Compare your ideas with those of a classmate.

3. Form a team in class of interviewee and interviewer. Take ten-minute turns, having one person play the role of interviewee and the other the interviewer. Record your exchange and post as a file attachment in your class (if applicable), or post to YouTube or a similar Web hosting site and post the link. Write a report of your experience in no less than two hundred words.

Exercises (cont.)

4. Observe a press interview. How do they take turns? Does the interviewee ever look nervous? What could he or she have done to improve their performance? Write a brief suggestion and provide the link to the interview.

5. Find a sample press interview on a video Web site such as YouTube and evaluate it based on the guidelines in this chapter. Was it effective? Why or why not? Present your findings to the class.

6. Find at least one example of an interview gone bad. It may involve a misquotation, expressions of frustration or anger, or even an interview cut short. What happened? Provide a brief summary and provide the link to the interview.

References

McLean, S. (2005). *The basics of interpersonal communication*. Boston, MA: Allyn & Bacon.

4.5.6: Introducing a Speaker

Learning Objectives

1. Understand how to introduce a speaker in a courteous and professional manner.

A speaker introduction involves establishing the person's credibility, motivating audience interest, and saying what the speaker could not say. Not many speakers will jump to the stage and share their list of accomplishments, as this would appear arrogant and could quickly turn off an audience. At the same time, if you are able to share that they have turned two companies around and would like to share lessons learned, your audience may see the value in giving their attention. Being designated to introduce a speaker is an honor and an important duty that requires planning and preparation.

Scot Ober states, "Remarks should be directed at welcoming the speaker and establishing his or her qualifications to speak on the topic" (Ober, S., 1995). You may start with a quote from their work, or a quote from a publication or colleague describing them. You may decide to use humor. All these options are available, but whatever you choose, let respect and dignity be your overriding goal. The function and role of the introduction is to focus the spotlight squarely on the speaker. You should not distract the audience from that task with your dress, gestures, antics, or by talking about yourself.

The person you are introducing may already be well known to the audience, but you can always find some new information to share. You may need to consider the unusual, or the little known, when introducing someone who is famous. You may also consider mentioning their most recent work or activity as it relates to the topic of the presentation. Avoid the "laundry list" approach to a summary of their education and experience, as this may bore the audience. Instead, focus on something specific and relevant. Your range of options is almost limitless, but your time frame and overall function are not. You need to be brief, and you need to establish the speaker's credibility while motivating interest.

According to Bonnie Devet, "Performing the role of introducer also reinforces the rhetorical principles seminal to any business writing course: the need for ethos (credibility of both speakers and introducers), for audience-based discourse, and for accuracy" (Devet, B., 1995). Think of an introduction as a speech in miniature. Your purpose is to inform, your time frame is (typically) one to three minutes, and your specific purpose is to inform the audience about the speaker's qualifications, credibility, and enthusiasm for the topic he or she will cover.

Key Takeaway

To introduce a speaker is an honor and requires preparation and practice.

Exercises

1. Introduce a classmate who is about to present a report, document, or speech to the class. You can draw information from the Web (MySpace, Facebook, Twitter), the person's résumé, or even a personal interview. You will need to prepare your introduction in advance and may want to consider incorporating a quote from the document they will discuss. Keep your remarks to thirty seconds and your written introduction to no more than a hundred words.
2. Watch an introduction of a speaker—televised award ceremonies offer plenty of examples—and note one example that you consider effective, and one that you consider ineffective. Explain why you rated them this way. Report your response and the Web links.
3. List five facts, points, or things about yourself and your career that you would want an audience to know. Post your results and compare with classmates.

References

Devet, B. (1995). Introducing a speaker: An assingment for students in business communication. *Business Communication Quarterly*, *58*, 57–58.

Ober, S. (1995). *Contemporary business communication* (2nd ed., p. 478). Boston, MA: Houghton Mifflin.

4.5.7: Presenting or Accepting an Award

Learning Objectives

1. Discuss the purpose of an award.
2. Describe the process of presenting an award.
3. Describe the process of accepting an award.

There is nothing more gratifying than recognition from your peers and colleagues for a job well done. We all strive for acceptance, and recognition is a reflection of belonging, a basic human need (Schutz, W., 1966). In this chapter we will discuss how to present or accept an award tactfully, graciously, and professionally.

First, make sure that you have all the information correct before you get up to speak: the honoree's correct name and how it is pronounced, the correct title of the award, and the details about the honoree's accomplishments that you are about to share. The spotlight will be on you, and your accurate delivery will be crucial to the happiness of the occasion.

When presenting an award, the key is to focus attention on the honor and the person receiving it—not on yourself. You may have been part of the committee that chose the winner, or involved in some other way, but your role should never upstage that of the person being honored.

You can focus the attention on the recipient in two ways: surprise or direct acknowledgement. In the surprise approach, you mention characteristics of the person receiving the award without initially mentioning their name—allowing the audience to start guessing who it might be. You may mention a list of accomplishments, or perhaps a positive story. With the surprise approach, you share the information that is sure to reveal the recipient's identity right before you present the award.

You may prefer, however, a direct acknowledgement of the honoree's performance or service and simply announce his or her name. The direct acknowledgement approach is typically followed by the reasons for choosing this person to receive the award, or include his or her past accomplishments. This direct strategy may be preferred if the audience is not familiar with the recipient.

Table $4.5.7.1$summarizes the process of presenting an award.

Table 4.5.7.1: Presenting an Award

Preparation	Verify the recipient's name, the correct title of the award, and details about the recipient.
Focus	Keep the focus on the honoree, not on yourself or the awards committee.
Surprise Approach	Build suspense by listing the winner's accomplishments from general to more and more specific; end by disclosing a unique accomplishment that identifies the winner, and finally announcing his or her name.
Direct Approach	Announce the award winner and follow with a list of his or her accomplishments.
Exit	Step aside and let the honoree have the spotlight.

If you are the award recipient, be aware that the acceptance of an award often provides a moment of influence on the audience that can serve to advance your position or cause. Use of the limelight is an important skill, and much like any speech or presentation, it requires planning and preparation. You don't want to be caught speechless, and you want to project a professional presence that corresponds to the award or recognition.

If you know you are being considered for an award, first consider what the award recognizes within your professional community. An award is a symbol of approval, recognition, or distinction that honors the recipient in public. As the recipient, it is your role to convey recognition of that honor with your gracious acceptance.

Perhaps you have seen an awards ceremony on television, where a producer, composer, actor, or musician has received public recognition. Sometimes the acceptance unifies the community and serves as an inspiration to others. Other times the recipient stumbles, talks as fast as they can to list all the people who helped them reach their goal (often forgetting several, which can hurt feelings), or they use the spotlight to address an unrelated issue, like a political protest. They may mumble, and their nervousness may be so obvious that it impacts their credibility. Accepting an award is an honor, an opportunity, and a challenge.

The first step in accepting an award is to say thank you. You can connect with the audience with your heartfelt emotional displays and enthusiasm. Raised arms, clasped hands, and a bow are universal symbols of respect and gratitude. Note that rambunctious displays of emotion such as jumping up and down or large, sweeping gestures are better left for the athletic fields. An award ceremony is a formal event, and your professionalism will be on display for all to see.

Next, you should consider giving credit where credit is due, noting its relevance to your field or community. If you name one person, you have to be sure to not leave anyone out, or you run the risk of hurting feelings and perhaps even making professional enemies. If you confine your credit list to a couple of key people, it is wise to extend the credit beyond the individual mentions by saying something like, “There are so many people who made this possible. Thank you all!” You should link your response to the award organization and your field, industry, or business. Don’t apologize or use terms that can be interpreted as negative. The acceptance of an award is a joyous, uplifting affair, and your role is to maintain and perpetuate that perception.

You may also consider linking your award to a motivational anecdote. A brief, personal story about how a teacher or neighbor in your community motivated you to do better than you thought you could and how you hope this can serve to motivate up-and-coming members to strive for their very best, can often stimulate an audience. Don’t exaggerate or stretch the story. The simple facts speak for themselves and the award serves as a powerful visual aid.

Say “thank you again” as you leave the stage, facilitating the transition to the next part of the ceremony while acknowledging the honor. You may need to take note where previous recipients have exited the stage to proceed without error, or simply return to your seat. Your brief comments combined with a graceful entrance and exit will communicate professionalism. Table 4.5.7.2 summarizes the steps we have outlined.

Table 4.5.7.2: Accepting an Award

Acceptance	Say “thank you.”
Relevance	Indicate where credit is due, what the award means to you, and how it relates to the awarding organization or your community.
Acknowledgment	Show your honor with dignity and respect as you say “thank you” again and exit the stage.

Key Takeaway

Awards are public recognitions of success, and tact and grace are required both in presenting and receiving them.

Exercises

1. Who needs to be prepared to present an award in a business and why? Discuss your ideas with the class.
2. This can be a fun two-minute oral communication exercise. In the exercise, you will alternate between the role of the award announcer and the recipient. You will be paired up into teams where you will need to create a business or industry award, prepare a brief script and notes on acceptance, and then demonstrate your results for your class. The introduction of the speaker should last no more than thirty seconds and the acceptance should also be completed in less than a minute. If you are at a distance from your class, you may be assigned a particular role that fits your situation. Record your performance and post it in class.
3. Find one example of an award acceptance speech that you perceive as particularly effective. Indicate why and share the link. Compare with your classmates.
4. Find one example of an award acceptance speech that you perceive as particularly ineffective. Indicate why and share the link. Compare with classmates.

References

Schutz, W. (1966). *The interpersonal underworld*. Palo Alto, CA: Science and Behavior Books.

4.5.8: Serving as Master of Ceremonies

Learning Objectives

1. Discuss the role of master of ceremonies.
2. Understand the responsibilities of the master of ceremonies.

A master of ceremonies is the conductor of ritual gatherings. The master of ceremonies (or MC for short, often written as "emcee") has the poise and stage presence to start, conduct, and conclude a formal ceremony for a group or community. Typically emcees will be full members of the community, recognized for their credibility, integrity, service, and sense of humor. The emcee sets the intellectual and emotional tone for the event.

At a conference or other business function, the master of ceremonies is often the first person to take the stage and the last one to leave it. They come completely prepared to make sure the agenda is followed, nothing is forgotten, all transitions go smoothly, and the event starts and ends on time. While many business conferences are not humorous affairs, a sense of humor can go a long way in helping defuse tension when unavoidable delays, problems, or errors occur. The emcee is required to help an unprepared speaker accept an award, move to their conclusion, and exit the stage. While a shepherd's crook might seem like an attractive tool for that role, often eye contact and a nonverbal gesture, such as a couple of steps toward the podium, will do the trick. If not, a gentle hand on a shoulder might be required, or even an interjected word about the schedule. The speaker knows and the audience expects the master of ceremonies to keep the ceremony on track with honor and respect.

If you are assigned to act as emcee for an event, you should have an agenda that includes all the components of the event, from start to finish, with estimations of time, roles, functions, and notes concerning responsibility. If this is not provided for you, you will need to compile it yourself. In either case, make sure the agenda is available far enough in advance that you can study it, become familiar with the key components and transitions, and anticipate any challenges that are likely to arise. If possible, you should also communicate with the people who will be joining you on stage: featured speakers, award presenters, and the like. You need to confirm their availability and understanding of their roles, with special attention to reinforcing time commitments.

One trick of the trade is to incorporate time as transitions. If you have a one-hour ceremony involving several awards and one featured speaker, indicate on the agenda that the speaker has seven minutes for their presentation. Communicate this to them before the event so they can prepare their remarks around this time frame. Then budget three minutes as a transition to the next event. It won't take you three minutes to make the transition, but by building this time window into the schedule you allow for a degree of overlap that may be required to keep the event on track in case the speaker speaks for nine minutes.

It is especially important to observe the schedule if you are emceeing a multipart event with breakout sessions and/or segments on different topics of interest to different audiences. Imagine an all-day conference for which some attendees registered only for the afternoon session and some only for the morning. Now imagine that the morning speaker was delayed due to a travel mishap. As emcee, would you decide to postpone the morning topic and have the afternoon speaker give his presentation in the morning? If so, you would need to be prepared to give refunds to afternoon attendees who missed the speaker they signed up to hear—and even if their registration fees were refunded, they might still be upset about having spent time and money traveling to the event. The solution? Have a "Plan B," such as a substitute speaker who is qualified to present on the topic of the "top billed" speaker.

A professional master of ceremonies is expected to keep the event running on time while "making it look easy." The audience will appreciate the seamless progression as the event proceeds.

Key Takeaway

Serving as the master of ceremonies is an honor that involves a great deal of responsibility and preparation.

Exercises

1. Create a sample awards ceremony that incorporates the acceptance speech assignment as well as the introducing a speaker assignment. This assignment then combines three functions into one, where each person plays their role. One person will need to serve as master of ceremonies. If the class is large enough, you may be able to subdivide into groups and hold separate ceremonies in more than one classroom. Planning and preparing a ceremony takes time and attention to detail. It also never goes as planned. Remain calm and relaxed as you perform your awards ceremony.
2. Evaluate a master of ceremonies and post your results. Share and compare with classmates.

4.5.9: Viral Messages

Learning Objectives

1. Discuss the elements of viral messages.
2. Understand strategies to develop effective viral messages.

What was once called "word of mouth" advertising has gone viral with the introduction of social marketing via the Internet. What was once called a "telephone chain," where one person called another in order to pass along news or a request in a linear model, has now gone global. One tweet from Twitter gets passed along and the message is transmitted exponentially. The post to the Facebook page is seen before the nightly news on television. Text messages are often real time. Radio once beat print media to the news, and then television trumped both. Now person-to-person, computer-mediated communication trumps them all at the speed of light—if the message is attractive, relevant, dramatic, sudden, or novel. If no one bothers to pass along the message, or the tweet isn't very interesting, it will get lost in the noise. What, then, makes a communication message viral?

Let's look at the June 2009 death of Michael Jackson for an example of a viral message and see what we can learn. According to Jocelyn Noveck, news of his death spread via Twitter, text messages, and Facebook before the traditional media could get the message out. People knew about the 911 call from Jackson's home before it hit the mainstream media. By the time the story broke, it was already old (Noveck, J., 2009).

People may not have had all the facts, but the news was out. Communities, represented by families, groups of friends, employees at organizations, had been mobilized to spread the news. They were motivated to share the news, but why?

Effective Viral Messages

Viral messages are words, sounds, or images that compel the audience to pass them along. They prompt people to act, and mobilize communities. Community mobilization has been studied in many ways and forms (Freire, P., 1970). We mobilize communities to leave areas of disaster, or to get out and walk more as part of an exercise program. If we want people to consider and act on a communication message, we first have to gain the audience's attention. In our example, communities were mobilized to share word of Jacksons' passing. Attention statements require sparks and triggers. A spark topic "has an appeal to emotion, a broad base of impact and subsequent concern, and results in motivating a consensus about issues, planning, and action" (McLean, S., 1997).

In the example of Michael Jackson, the consensus may be that he died under suspicious circumstances, but in other examples, it could be that the product or service being discussed is the next cool thing. The message in social marketing and viral messages does not exist apart from individuals or communities. They give it life and attention, or ignore it.

If you want to design a message to go viral, you have to consider three factors:

1. Does it have an emotional appeal that people will feel compelled to share?
2. Does it have a trigger (does it challenge, provide novelty, or incorporate humor to motivate interest)?
3. Is it relevant to the audience?

An appeal to emotion is a word, sound, or image that arouses an emotional response in the audience. Radio stations fill the airwaves with the sounds of the 1980s to provoke an emotional response and gain a specific demographic within the listening audience. The day after the announcement of Michael Jackson's death broke, you could hear his music everywhere. Many people felt compelled to share the news because of an emotional association to his music, the music's association to a time in their lives, and the fact that it was a sudden, unanticipated, and perhaps suspicious death.

A trigger is a word, sound, or image that causes an activity, precipitates an event or interaction, or provokes a reaction between two or more people. In the case of Michael Jackson, the triggers included all three factors and provoked an observable response that other forms of media will not soon forget. His death at a young age challenged the status quo. In the same way, videos on YouTube have earned instant fame (wanted or unwanted) for a few with hilarious antics, displays of emotion, or surprising news.

The final ingredient to a viral message is relevance. It must be immediately accessible to the audience, salient, and important. If you want someone to stop smoking, graphs and charts may not motivate them to action. Show them someone like them with postsurgery scars across their throat and it will get attention. Attention is the first step toward precontemplation in a change model that (Prochaska, J. and DiClemente, C., 1982) may lead to action.

Key Takeaway

Viral messages are contagious.

Exercises

1. Design a viral message about a hypothetical product or service you would like to promote. Incorporate the elements listed above in no more than a hundred words. Post your viral message in class and compare with classmates.
2. Identify a company that is relevant to your major or interests and locate an example of their marketing material about a specific product or service. Write a viral message as if you were an employee presenting to a potential client. Share and compare with classmates.
3. Consider a message you passed along recently. Write a brief description and include discussion on why you passed it along.
4. What motivates you to pay attention? Make a list of five ideas, images, or words that attract your attention. Post and compare with classmates.

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McLean, S. (1997). A communication analysis of community mobilization on the Warm Springs Indian Reservation. *Journal of Health Communication, 2*, 113–125.

Noveck, J. (2009, June). *Jackson death was twittered, texted, and Facebooked*. Retrieved from news.yahoo.com/s/ap/20090627/ap_en_ot/us/michael_jackson_the_media_moment.

Prochaska, J., & DiClemente, C. (1982). Transtheoretical therapy: Toward a more integrative model of change. *Psychotherapy: Theory, Research, and Practice*, *19*(3), 276–288.

4.5.10: Additional Resources

Visit this site for an "elevator speech" template. sfp.ucdavis.edu/files/163926.pdf

Hark.com provides videos of current popular soundbites http://www.hark.com/

"Good quotes/sound bites are the salsa on the nacho chip of our narrative." http://knightpoliticalreporting.syr.edu/wp-content/uploads/2012/05/Choosing-Good-Quotes-Soundbites.pdf

"Getting Maximum Value From The Six Touch Points Of Communications" by Nancy Friedman. www.networkingtoday.com/article/Getting%20Maximum%20Value%20from%20the%20Six%20Touch%20Points%20of%20Communications-175

Visit this Wall Street Journal site for information on succeeding in an employment interview. http://guides.wsj.com/careers/category/how-to-succeed-in-a-job-interview/

"How to conduct a meeting." http://managementhelp.org/misc/meeting-management.htm

The Official Robert's Rules of Order Web Site: Robert's Rules Association is an unincorporated membership association representing Robert's Rules of Order, the guide to parliamentary procedure. http://www.robertsrules.com

A ten-step article from eHow on how to propose a toast. http://www.ehow.com/how_1383_propose-toast.html

Read an e-zine article by the Advanced Public Speaking Institute. "Being roasted is an honor, but you must be careful to honor people while you are roasting them during a public speaking engagement." http://ezinearticles.com/?Public-Speaking:-Roast-Humor-and-Insults&id=100203

"Preparing For Your Media Interview" by Judy Jernudd. http://www.streetdirectory.com/travel_guide/1578/business_and_finance/preparing_for_your_media_interview.html

"7 Tips on How to Prepare For Mainstream News and Feature Media Interviews" by Amelia Brazell from EzineArticles.com. http://ezinearticles.com/?News-Media-Interviews—7- Tips-on-How-to-Prepare-For-Mainstream-News-and-Feature-Media-Interviews&id=1178440

Read the Code of Ethics of the Society of Professional Journalists. http://www.spj.org/ethicscode.asp

How to introduce a speaker — the art of giving (and receiving) a great introduction, by Nick Morgan. http://publicwords.com/how-to-introduce-a-speaker-the-art-of-giving-and-receiving-a-great-introduction/

"How to Give an Acceptance Speech" by Patricia Fripp from The Sideroad. http://www.sideroad.com/Public_Speaking/acceptance_speech.html

Visit this site for a pamphlet on how to serve as a master of ceremonies. www.usda.org/trifold/IS04503.pdf

"Why Pass on Viral Messages? Because They Connect Emotionally," a *Harvard Business Online* article by Angela Dobele, Adam Lindgreen, Michael Beverland, Joelle Vanhamme, and Robert Van Wijk. https://hbr.org/product/why-pass-on-viral-messages-because-they-connect-emotionally/BH239-PDF-ENG

SECTION OVERVIEW

4.6: Research

4.6.1: Introduction to 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 which album 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.

Contributors and Attributions

4.6.2: Preliminary Research Strategies

Learning Objectives

Evaluate 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

https://assessments.lumenlearning.co...sessments/8548

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4.6.3: Finding Sources

Learning Objectives

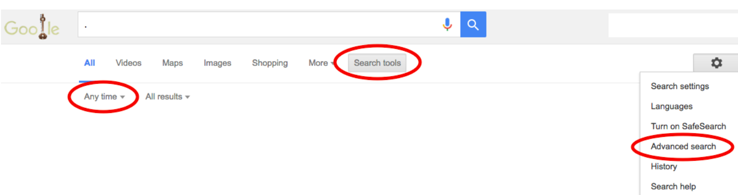
Discuss common tools and strategies for completing online searches

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

https://assessments.lumenlearning.co...sessments/8549

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4.6.4: Using Databases

Learning Objectives

Identify tools used to find scholarly secondary sources

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.

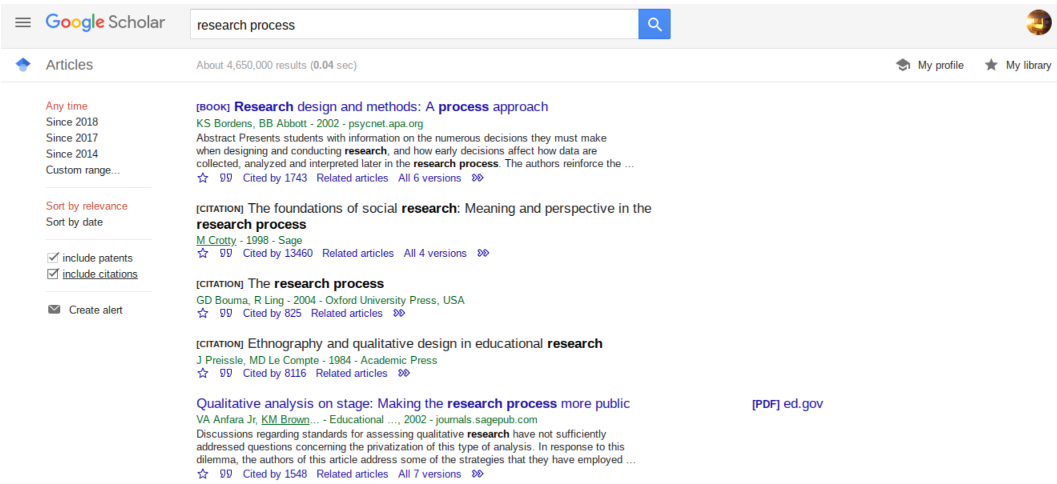


Figure 1. An example search in Google Scholar

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

https://assessments.lumenlearning.co...sessments/8550

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:

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=190

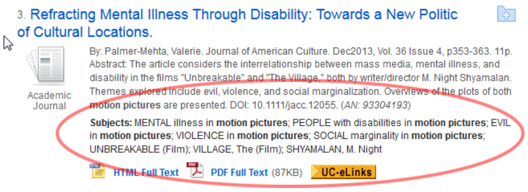
Finding Sources From Databases

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.

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4.6.5: Introduction to 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.

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4.6.6: Information Literacy

Learning Objectives

Identify the seven pillars of 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."[1]

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

https://assessments.lumenlearning.co...sessments/8551

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.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=194

1. American Library Association. Presidential Committee on Information Literacy. Final Report. (Chicago: American Library Association, 1989.) ↵

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4.6.7: Evaluating Sources

Learning Objectives

- Discuss the importance of evaluating sources and understanding biases

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

https://assessments.lumenlearning.co...sessments/8552

Learn More

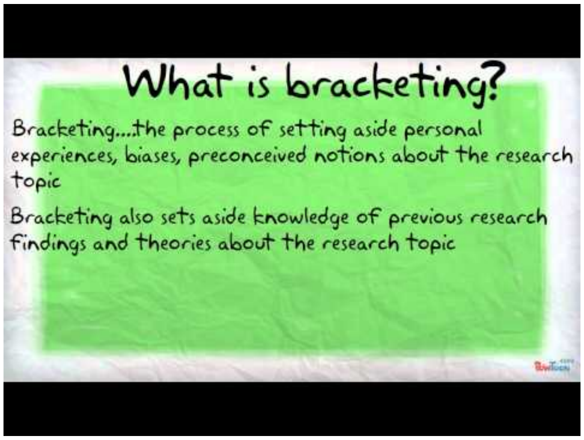
While we've boiled the evaluation of websites down to a few key tips, it is actually a complex topic that could fill books. For more information, check out Mike Caulfield's Web Literacy for Student Fact-Checkers.

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."[1]

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

https://assessments.lumenlearning.co...sessments/8553

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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1. Caulfield, Mike. "Why This Book?" *Web Literacy for Student Fact-Checkers*. Web. 30 June 2018. ↵

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4.6.8: CRAAP Analysis

Learning Objectives

Describe the components of the CRAAP analysis process

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.

https://youtu.be/u5EXUS-c5ag

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:[1]

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:[2]

- 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

https://assessments.lumenlearning.co...sessments/8554

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1. Flinders University. "Evaluating your source." Web. http://flinders.libguides.com/evaluate. 18 June 2018. ↵
2. Ibid. ↵

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4.6.9: Case Study- News Media Today

Learning Objectives

- Discuss the importance of evaluating sources and understanding biases
- Describe the components of the CRAAP analysis process

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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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.

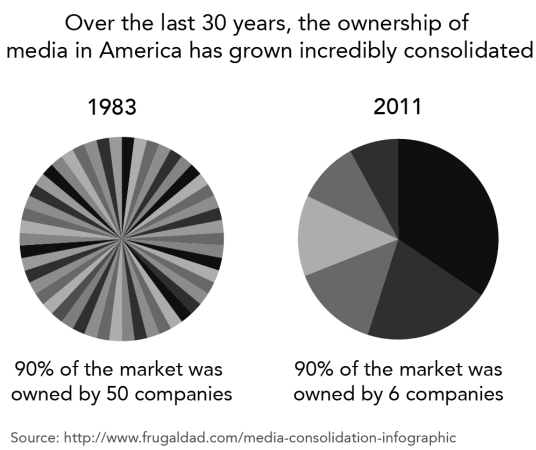

Figure 1. Media consolidation from 1983 to 2011

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.

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4.6.10: Synthesizing Sources

Learning Objectives

Describe techniques to incorporate sources into your writing.

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 citation 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

https://assessments.lumenlearning.co...sessments/8555

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.

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4.6.11: 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!

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4.6.12: Introduction to 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:

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=204

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:[1]

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.

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1. Larson, Aaron. "Fair Use Doctrine and Copyright Law". ExpertLaw.com.11 February 2018 Web. 16 April 2018. ↩

Contributors and Attributions

4.6.13: Professional Integrity

Learning Objectives

Discuss the importance of professional integrity in written communication/reports

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:[1]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:[2]

- 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

https://assessments.lumenlearning.co...sessments/8556

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1. Shen, Lucinda. "The 10 Biggest Business Scandals of 2017," *Fortune*. 21 Dec 2017. Web. 18 June 2018. ↵
2. University of St. Andrews. "Professional Integrity." Web. 18 June 2018. ↵

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4.6.14: Avoiding Plagiarism

Learning Objectives

Identify instances of plagiarism, both intentional and unintentional

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

https://assessments.lumenlearning.co...ssments/8557.1

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.

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."[1] 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

https://assessments.lumenlearning.co...sessments/8558

1. UNSW Sydney. "How Does Plagiarism Happen?" Web. 18 June 2018. ↵

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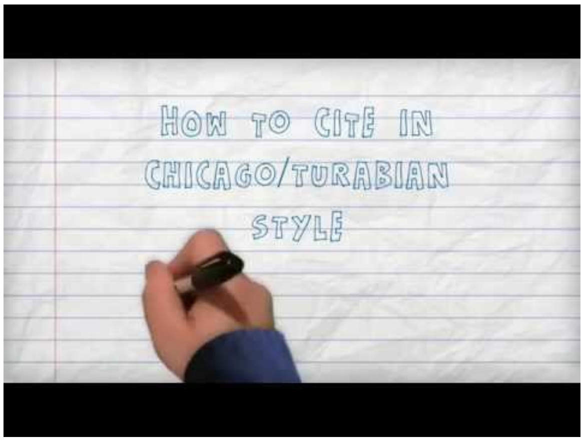
- 10 Famous Cases of PLAGIARISM. **Authored by**: MatthewSantoro. **Located at**: https://youtu.be/hDnN9TeN65E. **License**: *All Rights Reserved*. **License Terms**: Standard YouTube License

4.6.15: Documenting and Citing Sources

Learning Objectives

- Document and cite sources using the correct style and formatting

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 of the Chicago Manual of Style, now on its 17th edition.



A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=210

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

https://assessments.lumenlearning.co...sessments/8559

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4.6.16: 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.

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4.6.17: Assignment- Research

Retailers are becoming increasingly aware of how charitable contributions to local communities and non-profit organizations can impact customer buy-in and brand loyalty to the company. Your general manager has asked you to research a possible community service opportunity for your workplace. Some examples include reading to children at a school, sponsoring a blood drive with the Red Cross, or a local wildlife volunteer event, or a local volunteer litter clean-up event etc.

Your task for this assignment is to write a three-paragraph (minimum) memo addressed to the general manager and team leads at your store. In your memo, recommend one charitable organization you wish to partner or volunteer with that you found via a web search. This memo will briefly discuss the rationale and benefits of partnering with a non-profit, and propose a date for a meeting for your team and members of the charitable organization.

Part 1: Research

Create a short screen capture demonstrating your online search methods for the questions below (should only be 2–3 minutes long). You will submit this video per the course instructor's directions.

1. How many non-profit or charitable organizations are in your city?
2. How many non-profit or charitable organizations are within a 5, 10, 15, and 20 mile radius of the school/business you work for?
3. Find the five best rated non-profit or charitable organizations within a 5, 10, 15, and 20 mile radius of the school location/business you work for.

Part 2: Analysis

After searching and collecting the information for the questions in Part 1, you will analyze this data to decide which charitable organizations would be the best match with your team. Use the chart linked below to compare your data from Part 1, Question 3.

You'll rank the charities, provide their names and answer the following two questions: 1) What is the organization's mission and what do they do? 2) How does this match the school or company's goals?

- Click here to download a PDF of the Analysis chart.
- Click here to download a .docx file of the Analysis chart.

Part 3: Writing

After you decide on one organization that best aligns with the goals and mission of your company write a memo or email message analyzing your findings. Make it clear in this memo which organization is your first recommendation that you wish to partner with and propose a date for a meeting on the organization to work with. This memo should briefly discuss the rationale and benefits of partnering with a non-profit, explain your recommendation for a non-profit foundation found during your research, and propose a date for a meeting with the charitable organization.

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**4 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**6 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**8 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**10 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**10 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Content	**4 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**6 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**8 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**10 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**10 pts**
Development – Critical Thinking	**8 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**12 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**16 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**20 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**20 pts**
Grammar, Mechanics, Style	**4 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**6 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**8 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**10 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**10 pts**
				Total:	**50 pts**

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4.6.18: Assignment- Secondary Research

Open Pedagogy Assignments are assignments in which students use their agency and creativity to create knowledge artifacts that can support their own learning, their classmates' learning, and the learning of students around the world. (See this peer-reviewed article for more details.) The assignment on this page is aligned to a learning outcomes of Business Communication for Managers and we've identified the module where the reading appears. All of the assignments can be created with a cell phone camera or any video recording device, Google or Word documents, and your learning management system.

Learning Outcome 4.1.5: Explain secondary research and how it is used to provide support to the report

In the module on Research, we provide a general overview about the role of primary and secondary research in writing business reports. For this assignment, you are going to work with a small group to hunt down useful links and resources for your fellow students about local businesses. This work will become a living document that future students will use.

Think of your audience as friends who just got a job with a local business. You want to help them understand their new employer with the best information you can find.

Choose one of the bullets in the Primary Research heading as your topic: Interviews, Surveys, Observations, or Analysis.

- In your own words, summarize on a Google Doc, or a similar online tool, why your topic is important to a researcher in business communication.
- Find an example of your topic from a business website. Provide the link.
- Why is your topic useful as secondary research with report writing? In other words, when would you use your topic in a report and why?

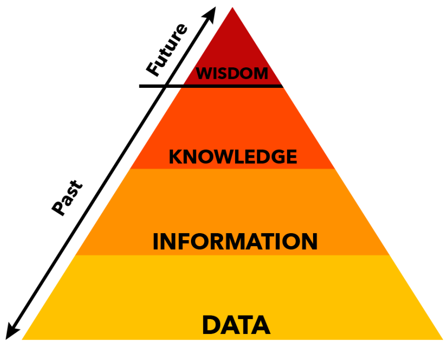
A Note To Teachers: You may want to break your students into groups and let them work on their own document that you will eventually create into one document. You may also want to point them to local businesses or industries that you focus on in your course such as retail or hospitality. If your first term's assignment is to create the document, think of the next term's assignment as checking that all of the links are correct and adding advice.

4.6.19: Introduction to 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."[1]

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.

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1. McAfee, Andrew and Erik Brynjolfsson. "What Makes a Company Good at IT?" *Wall Street Journal*, April 25, 2011. Web. 12 June 2018. ↵

Contributors and Attributions

4.6.20: Using Data for Impact

Learning Objectives

Discuss the impact of research in business reports

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:[1]

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[2], 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

https://assessments.lumenlearning.co...sessments/8535

1. Salisbury, Ian. "This Is Jeff Bezos' Best Advice About Making Big Decisions." *Time Money*. April 13, 2017. Web.12 June 2018. ↵
2. Elon University. "Data and Statistics." Accessed October 3, 2019. ↵

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4.6.21: Investing Time in the Research Process

Learning Objectives

Discuss the steps 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

https://assessments.lumenlearning.co...sessments/8536

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4.6.22: Types of Data Sources

Learning Objectives

- 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

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

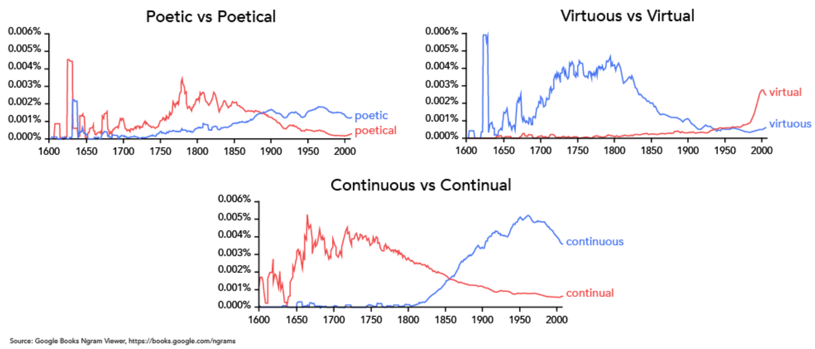

Figure 1. Comparison of word usage from 1600 to 2018

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 generally non-numeric and require context, time, or variance to have meaning or utility.
  - Examples: taste, energy, sentiments, emotions
- Quantitative data 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

https://assessments.lumenlearning.co...sessments/8537

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 Commission (SEC). For example, you can take a look at Apple's 10-K form.

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.

Apple Inc.

Form 10-K

For the Fiscal Year Ended September 30, 2017

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Figure 2. Apple's 10-K

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 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.

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 report writers will use secondary sources for their business reports in order to gather, curate, and present the material in a new, updated and helpful manner. Using secondary research is far less costly, more efficient, and requires less time to gather data from already developed sources.

In business, where everything has a cost, we may argue for maximizing secondary sources alone because 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 the already available secondary sources.

One example of secondary research is this McKinsey and Company discussion on data and analytics in business. Note how they have summarized other sources in a manageable report. Later in the module, you'll learn how to assess a source. Consider reviewing this McKinsey piece and analyzing this source with these tests and frameworks of determining quality research.

Practice questions

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https://assessments.lumenlearning.co...sessments/8539

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4.6.23: Introduction to Internal Data

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

Barron's defines internal data as:[1]

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:

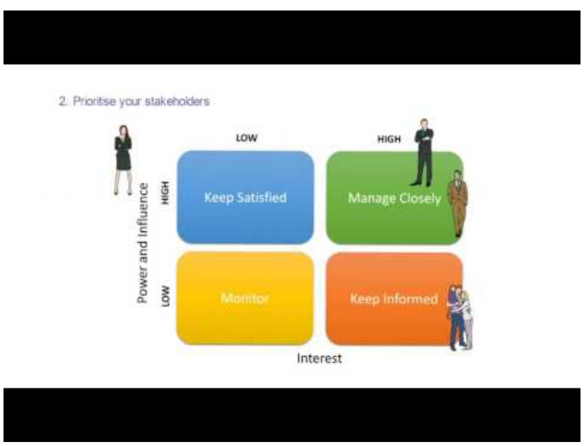
1. **The act of gathering information about your own organization is not without political and ethical considerations.** When a person from one part of the organization seeks data about another–or about the enterprise as a whole–it can have implications for the well-being and security of people's circumstances. 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 Apple's 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. 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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1. All Business, "Internal data." Barrons Dictionary. Web. 12 June 2018. ↵

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4.6.24: Primary Sources and Internal Data

Learning Objectives

- Identify types of primary sources and internal data
- Discuss methods for collecting and analyzing internal data

Primary Sources

Ithaca College Library defines primary sources as:[1]

[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.

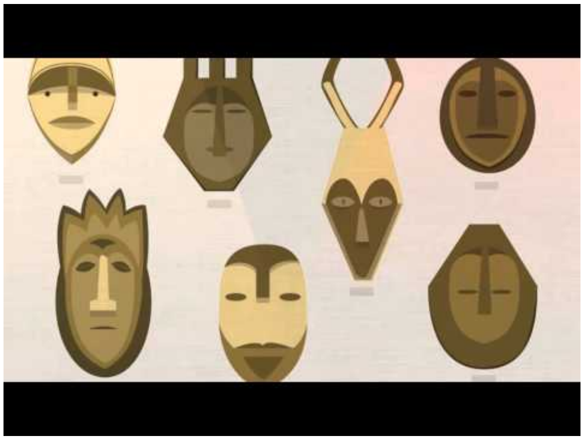
If we return to Martha's case, we remember that her project involves studying The Human Fund's impact on people who are homeless in downtown Chicago. Her background reading would certainly involve looking at any available data on-hand in her own organization. Depending on where she sits, and for whom 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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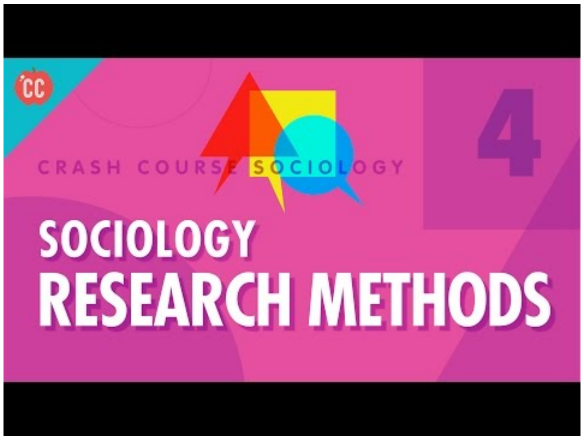

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Note the difference in attitude and goals. While this explanation is a bit simplified, the anthropologist is interested in observing and understanding culture; the sociologist surveys and tests ideas through the use of less personal, but more structured, 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.

practice question

https://assessments.lumenlearning.co...sessments/8541

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."[2] 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

https://assessments.lumenlearning.co...sessments/8542

1. Ithaca College Library. "Primary and Secondary Sources." Web. https://libguides.ithaca.edu/research101/primary. 18 June 2018. ↵
2. CBS News. "Intel's cultural anthropologist talks life and technology."16 May 2013.Web. https://youtu.be/ntnyl2V0U9g. 18 June 2018. ↵

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4.6.25: Working in Microsoft Excel

Learning Objectives

Create workbooks and format data in Microsoft Excel

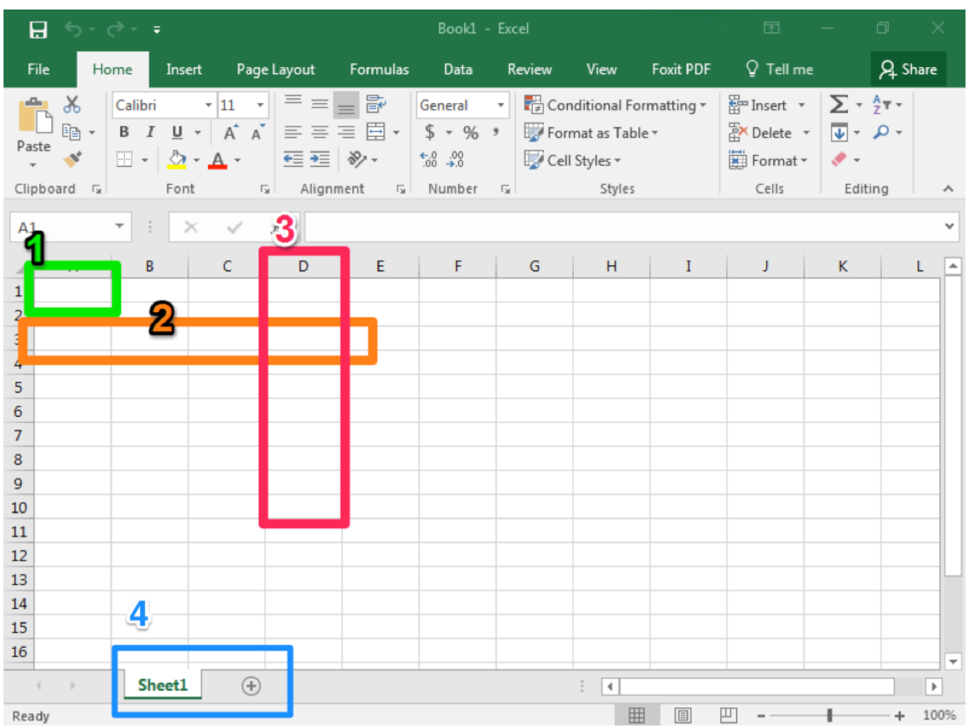
Imagine that you have a lot of business data. Perhaps you have names and addresses for a mailing list. Maybe you have inventory data or quarterly sales values. All this information could be kept in a Word document, but Microsoft Office actually has an extremely useful program for organizing, storing,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



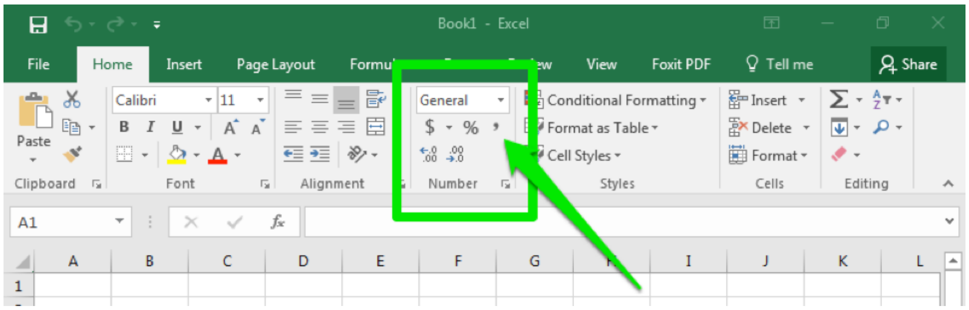
1. **Cell.** This is the area where you will enter data.
2. **Row.** Rows are cells aligned horizontally.
3. **Column.** Columns are cells aligned vertically.
4. **Worksheet.** A worksheet is a single page within a workbook. Like the tabs in an internet browser, the tabs in an Excel workbook show different 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.

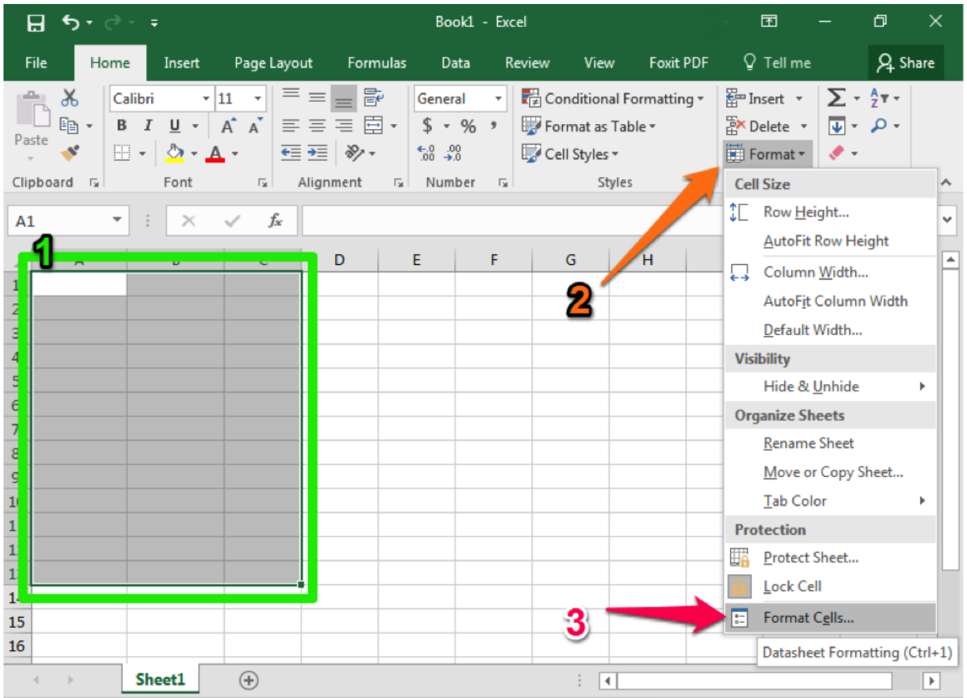
1. **Comma**: Comma with two decimal points (e.g., 1,234.00)
2. **Comma [0]**: Comma with no decimal points (e.g., 1,234)
3. **Currency**: Comma with two decimal points and a dollar sign (e.g., $1,234.00)

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.

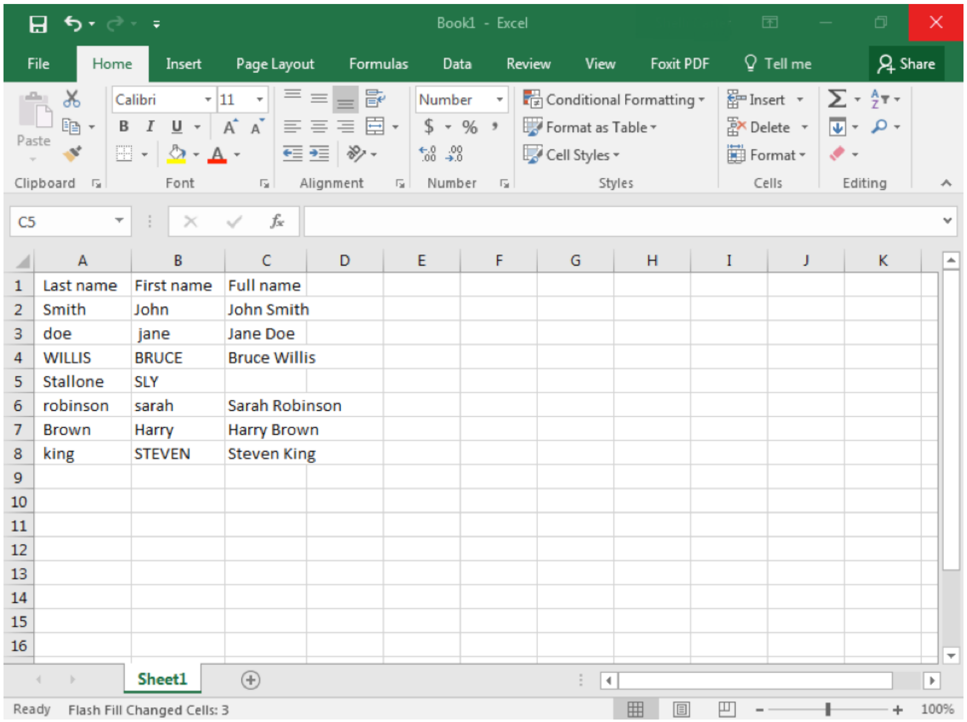


1. Begin by highlighting the cells you plan to use.
2. Select the Format dropdown from the Cells group of the ribbon.
3. Select the Format cells option at the bottom of the dropdown menu.

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.



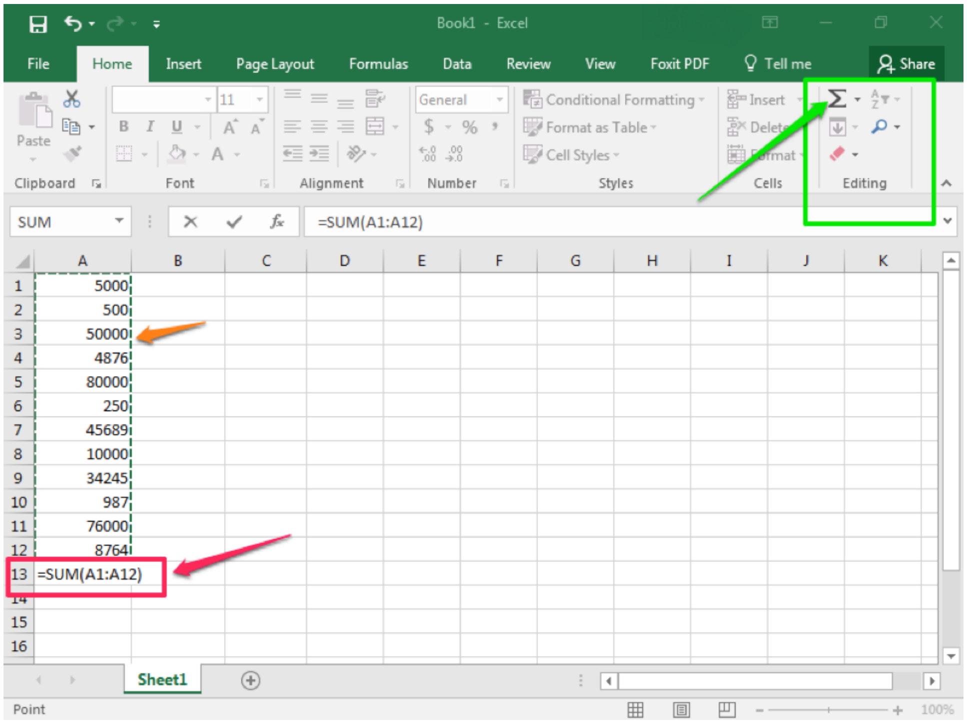
Flash Fill is especially helpful if your data is initially in different forms but you want the final information to display in the same fashion. For example, in our attendee list, some of the names were capitalized, in all caps, or had no capitalization. Sometimes you may need to manually update more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

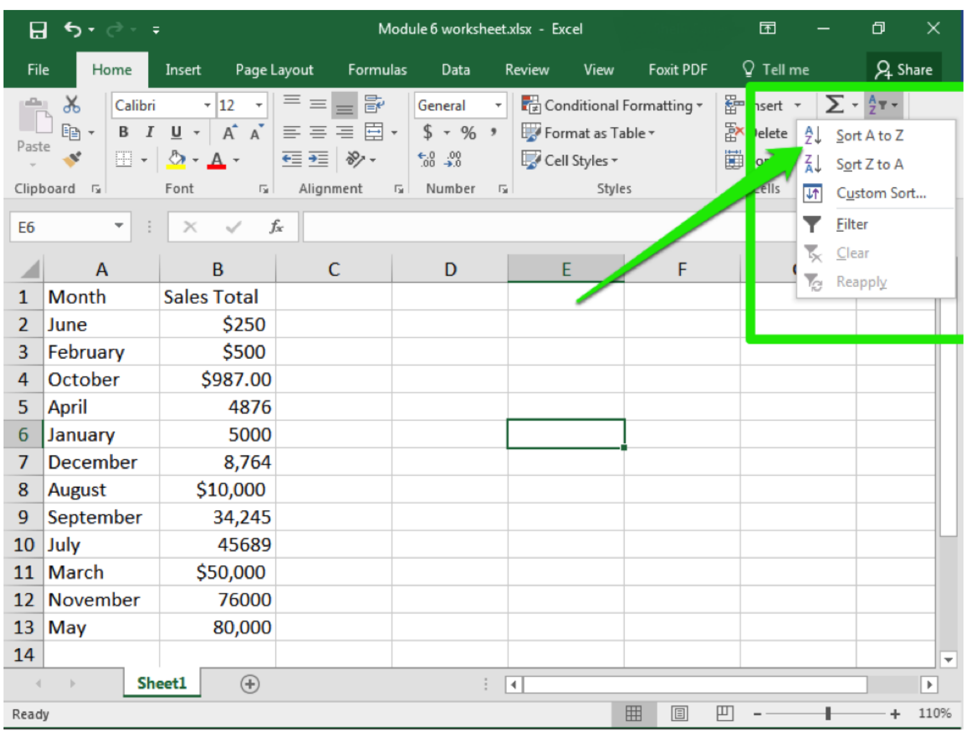
1. Once your numbers are organized in either a row or column, click on the cell where you would like the total sum to display. In the screenshot below this was A13.
2. Click on the AutoSum button from the Editing group of the ribbon.
3. Excel will highlight the cells that it is adding up and will apply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

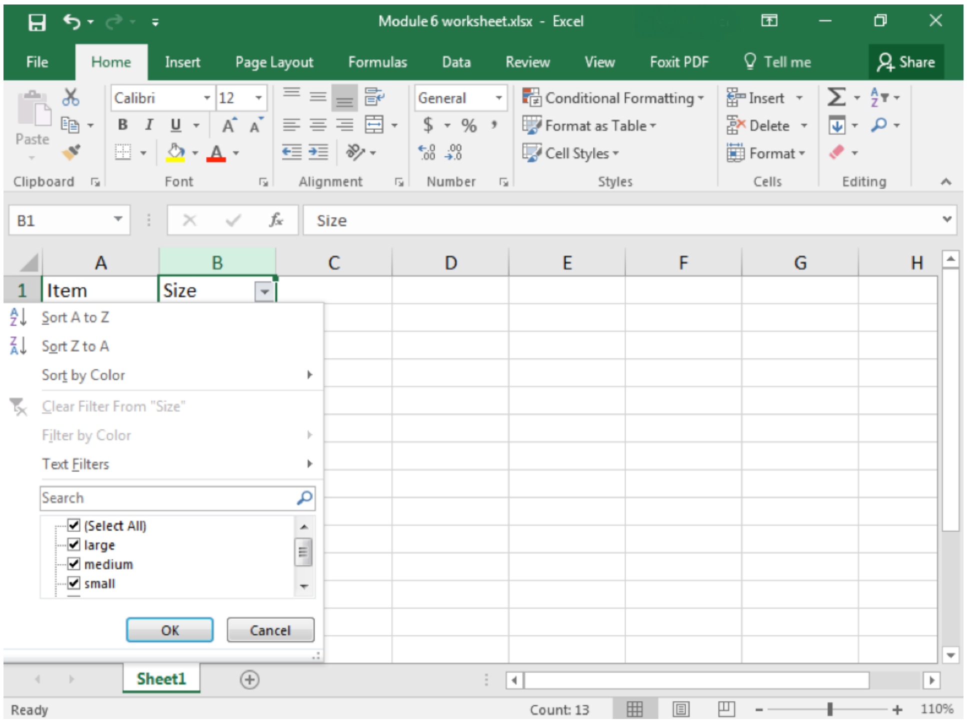
1. Select the column or row you wish to sort.
2. From the Sort & Filter button in the Editing group in the ribbon, click the Sort button.
3. From the menu, choose how you would like to sort the data. For example, A to Z or Z to A. Note that A to Z is equivalent to Smallest to Largest and Z to A is equivalent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



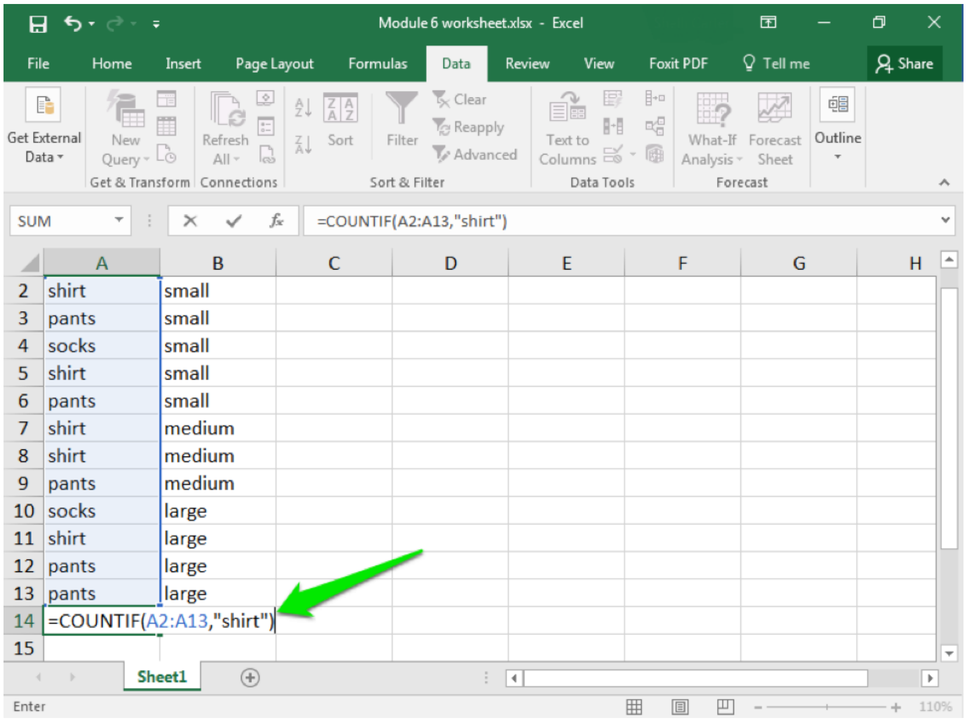
Functions

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")



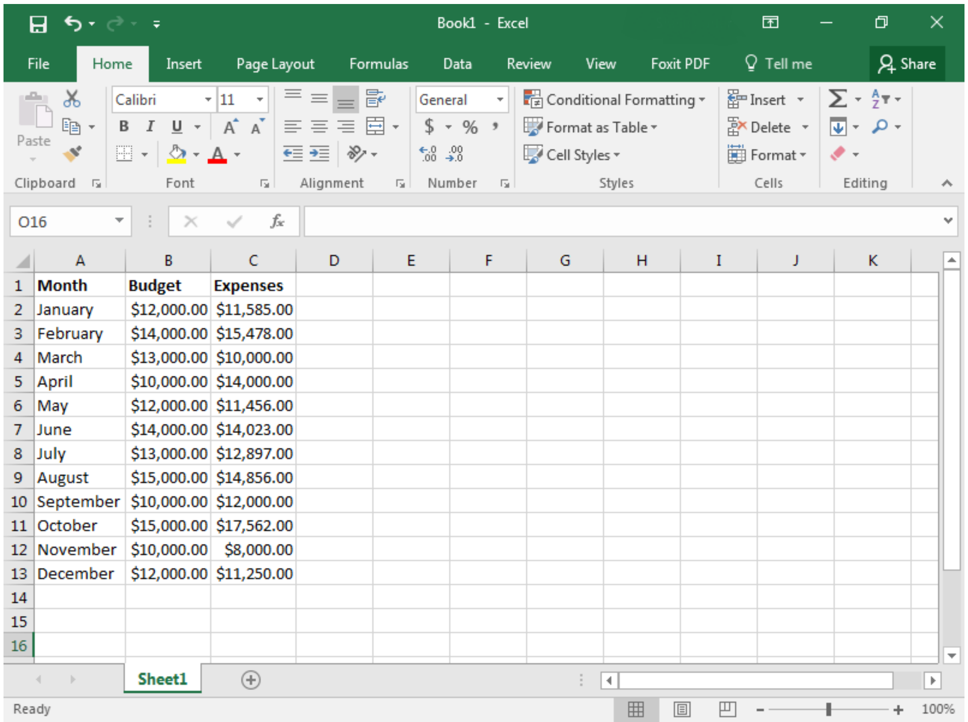
Here you are telling Excel which cells to examine—A2 through A13—and what to look for: “shirt.” Note that your text must match exactly what is typed in the cells, and if you are looking for a specific word it needs to be enclosed in quotation marks (so “shirt” instead of shirt).

4. Hit enter and your results will appear.

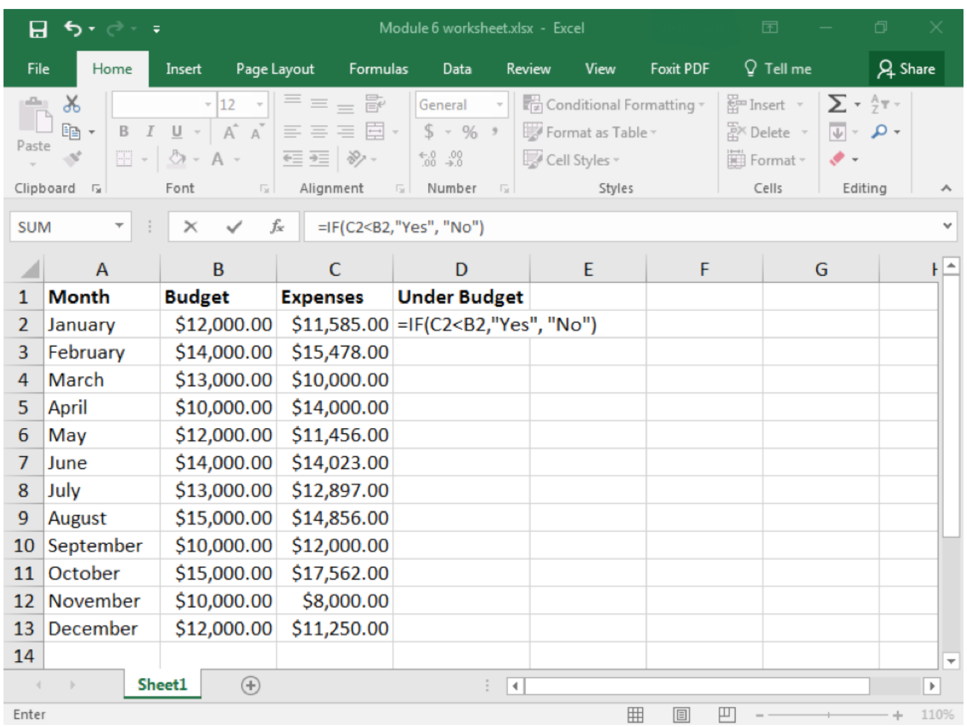
IF

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).

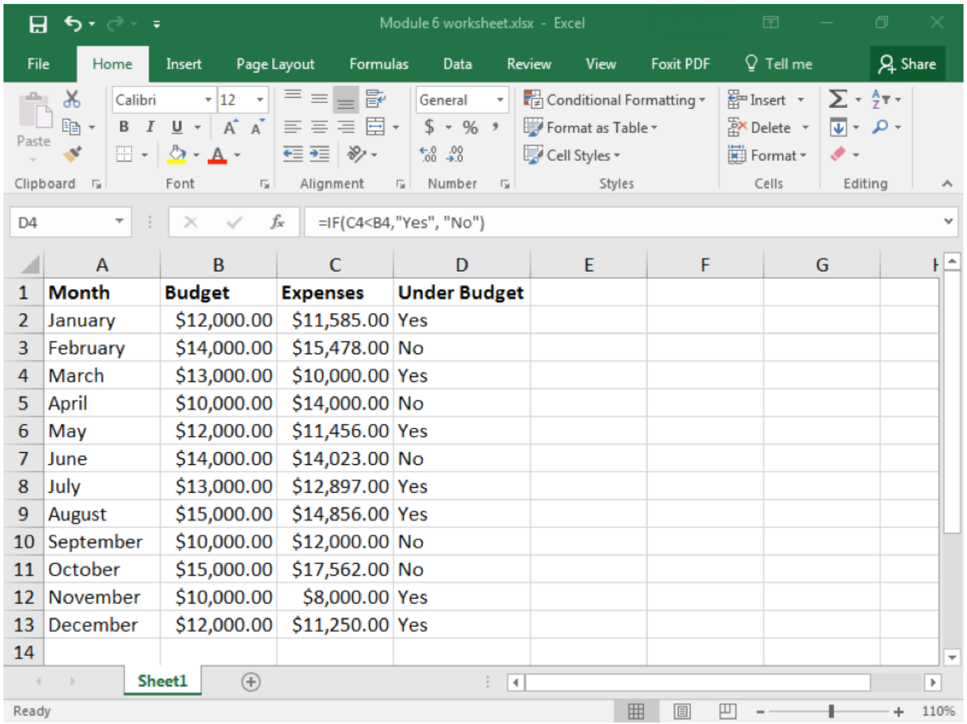


1. Click on D2 and enter the "IF" function for what you want Excel to compare and do. =IF(C2<B2, "Yes","No")



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

Practice Questions

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https://assessments.lumenlearning.co...sessments/8544

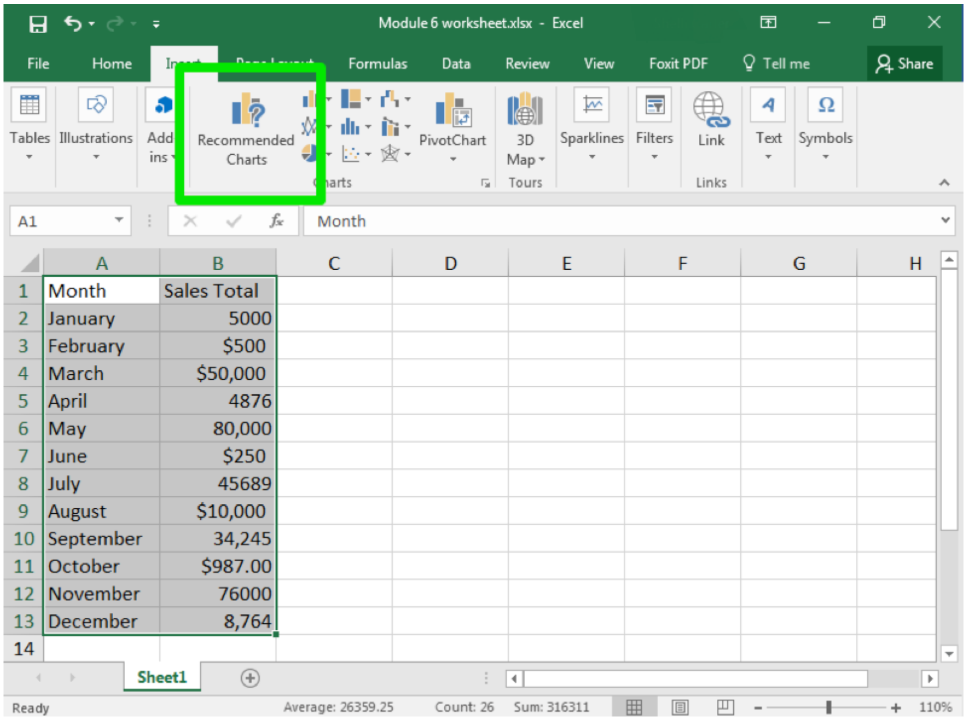
Clustered Column Charts

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.

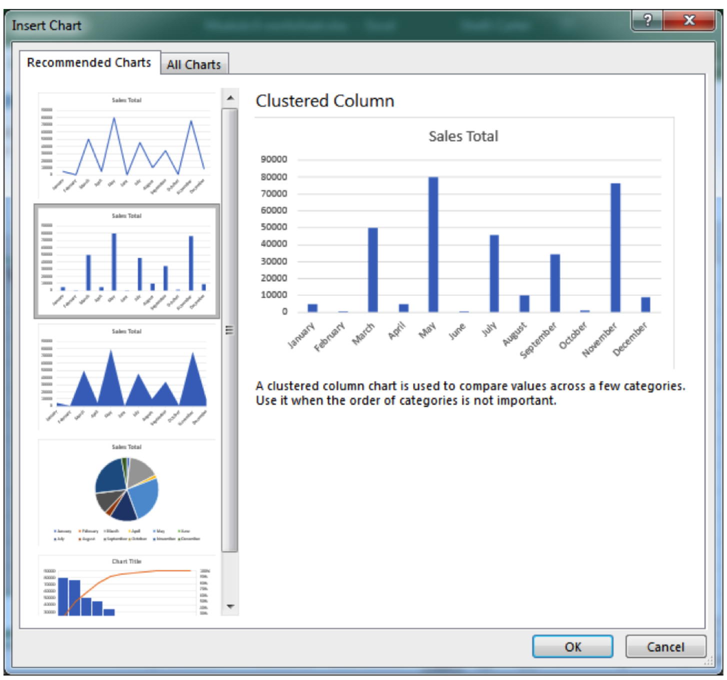
A clustered column chart is sometimes called a bar graph, because it shows data organized in solid shapes like pillars. A clustered column chart organizes these pillars up and down, so they are “columns.” On the other hand, a clustered bar graph organizes these pillars left to right, so they are “bars.” 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.

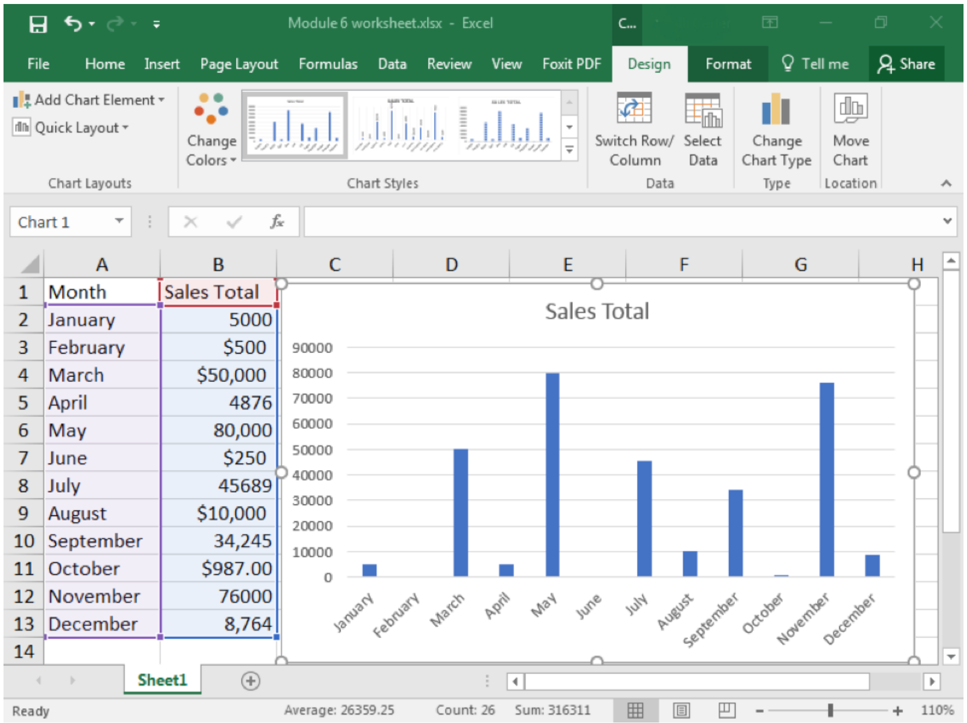
1. After organizing your data, select the cells you wish to include in the chart. This should be at least two columns.
2. Click on the Insert tab and find the Charts group of the ribbon.



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.

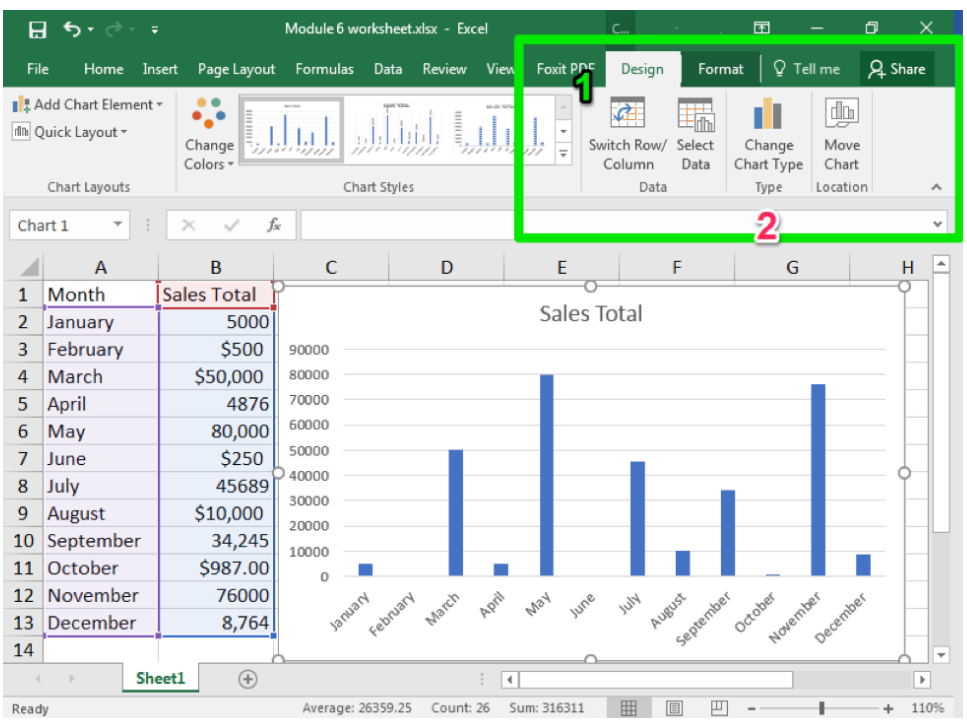


> **Practice Question**
>
> https://assessments.lumenlearning.co...sessments/8545

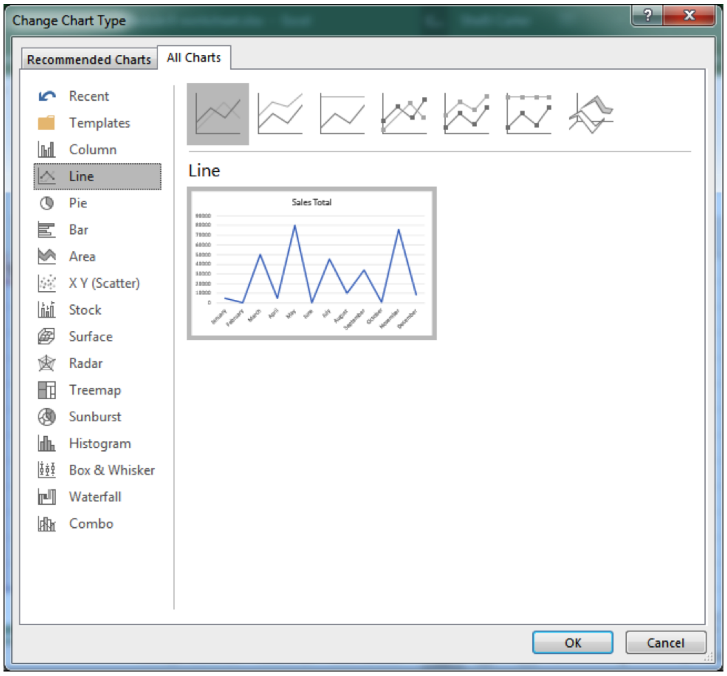
Chart Styles

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.

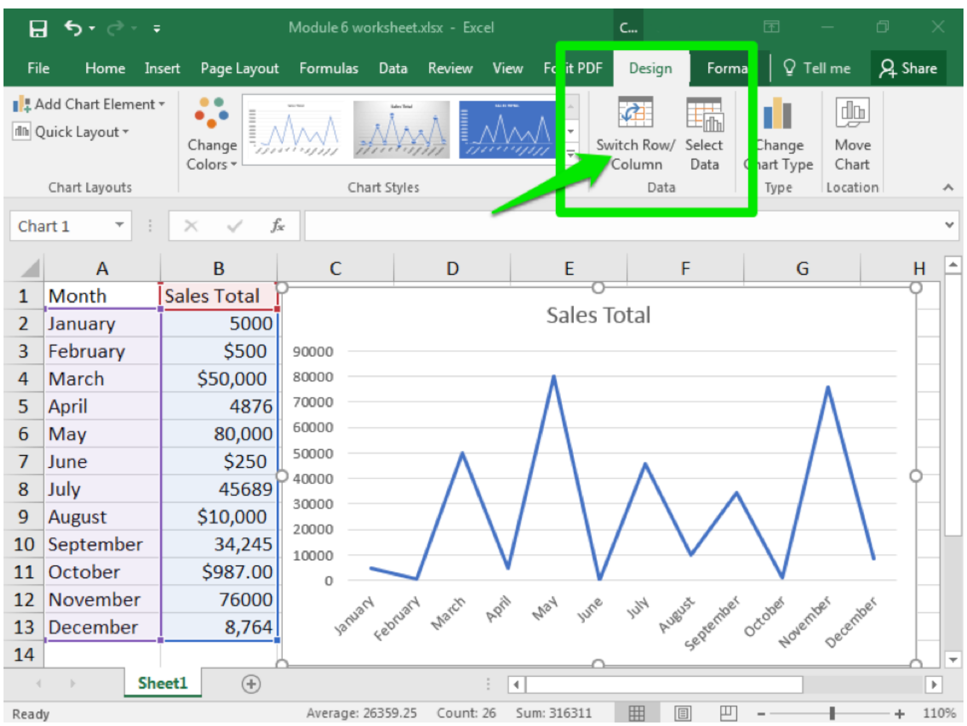
1. Click on the chart you wish to change. The Design tab should appear in the ribbon area.
2. Click on Change Chart Type button



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.

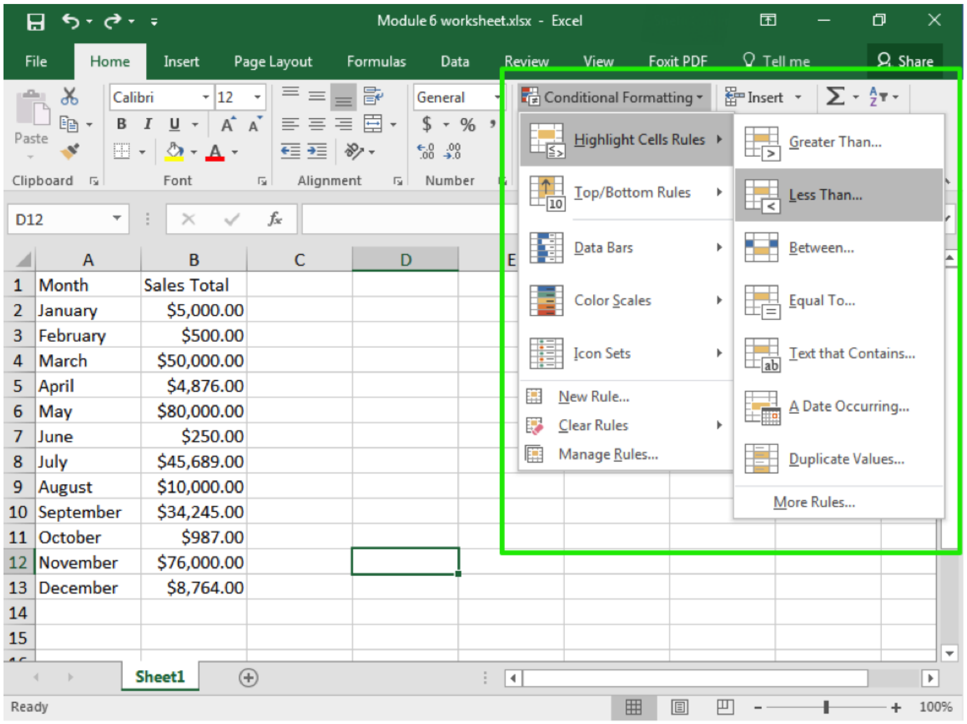


Conditional Formatting

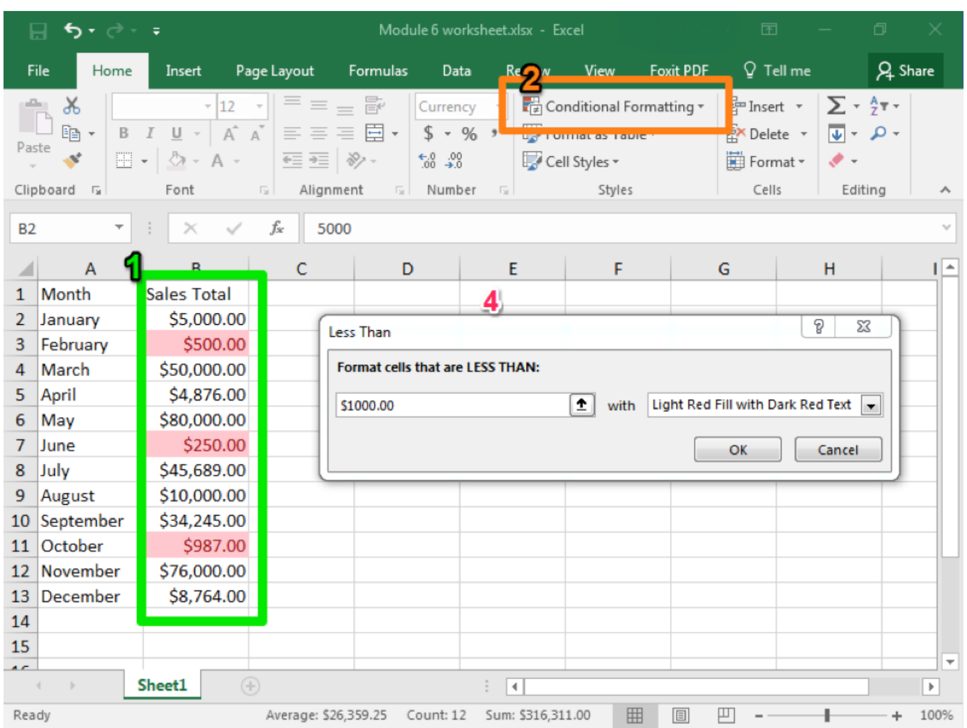
As we have learned so far, Excel has a wide variety of easy to use tools for organizing, sorting, and otherwise marking information. Think back to when we applied styles to a cell to indicate good information or information that needs to be verified. Excel also has the ability to automatically apply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

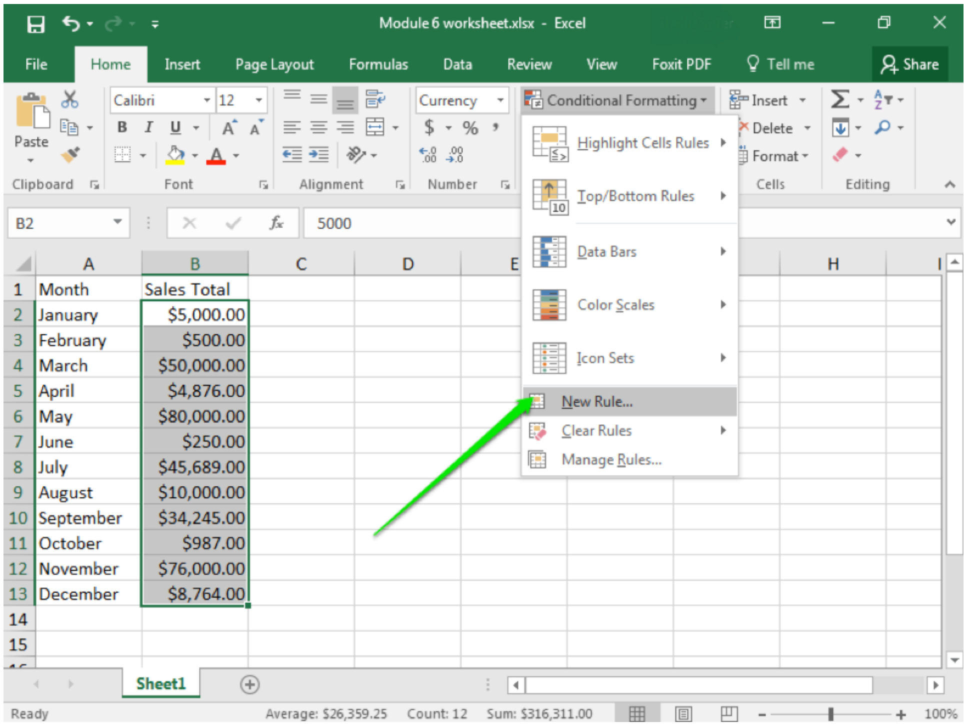
1. Select the cells, rows, or columns you wish to have conditional formatting.
2. From the Styles group, click on the Conditional Formatting button
3. Select the style of formatting you would like. Here we have Highlight Cell Rules.
4. Select the specific type of rule you would like to use and then apply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

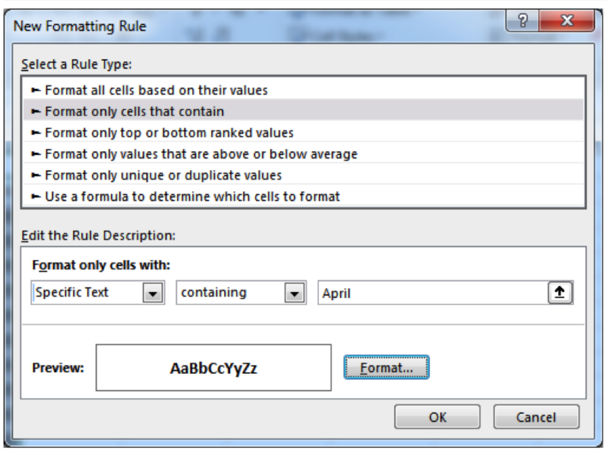


5. The formatting will appear automatically so you can see what it will look like. Note that Excel will automatically provide a value, but you can manually change it.
6. Hit OK if you wish to apply the formatting. Otherwise, when you leave the formatting menu, it will disappear.



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.





Practice Question

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4.6.26: Working in Google Sheets

Learning Objectives

Create workbooks and format data 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).

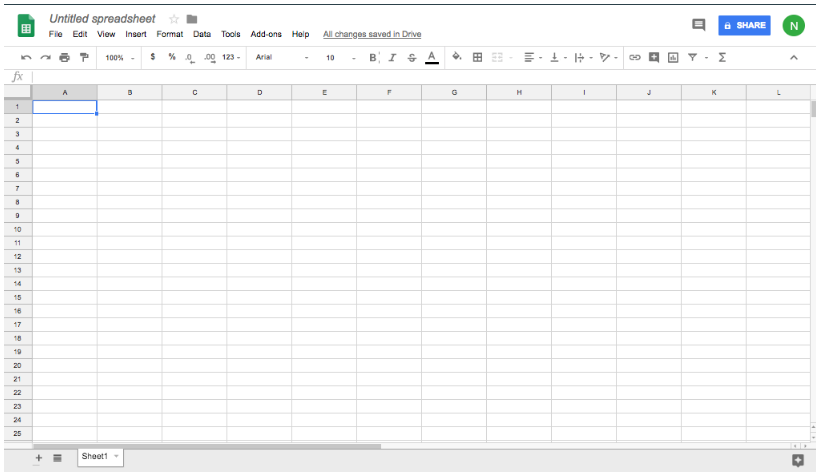

Figure 1. A new spreadsheet in Google Sheets

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.

Practice Question

https://assessments.lumenlearning.co...sessments/8547

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).

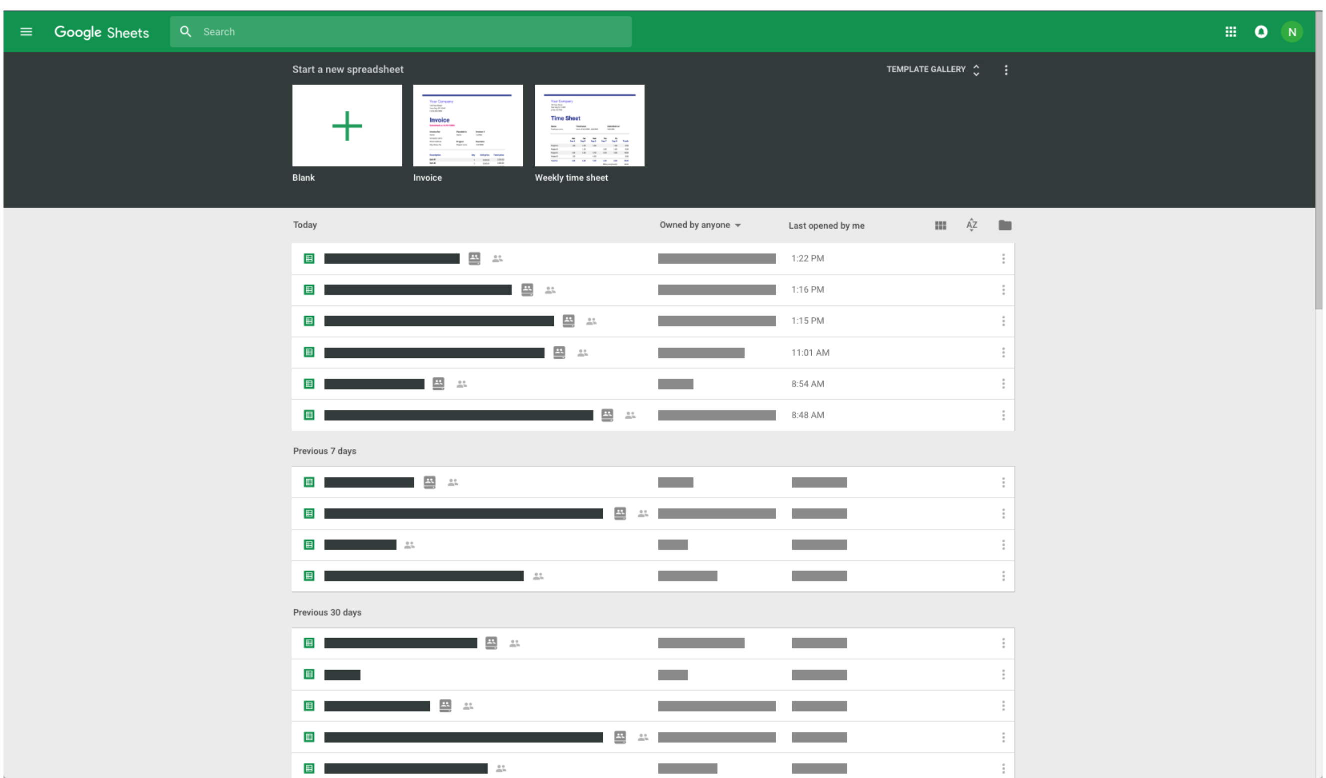

Figure 2. Creating a new spreadsheet

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.

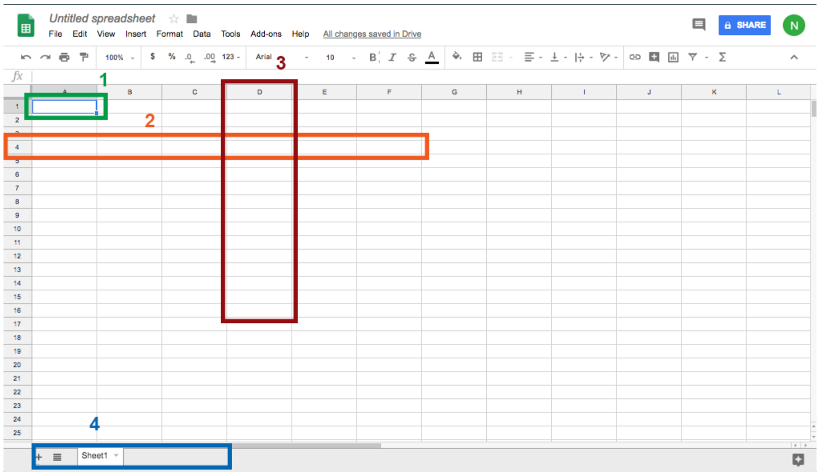

Figure 3. Four primary components of a spreadsheet

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).

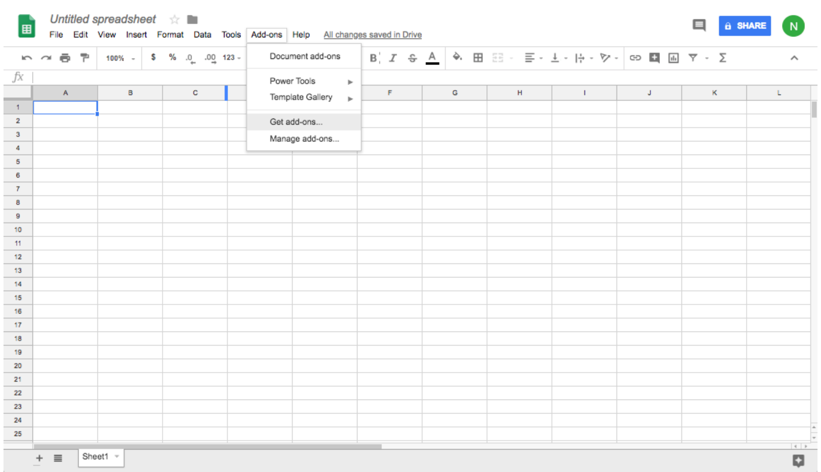

Figure 4. Add-ons are accessible through the menu bar

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).

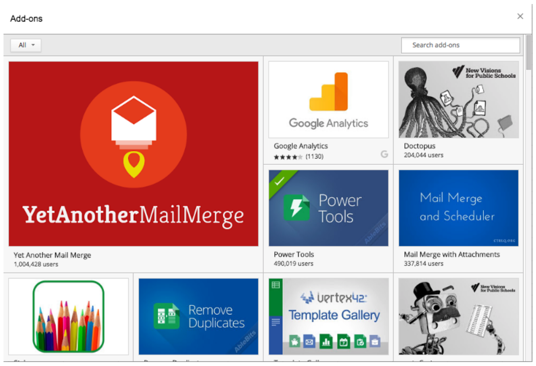

Figure 5. There are a huge variety of add-ons available in Google Sheets.

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.

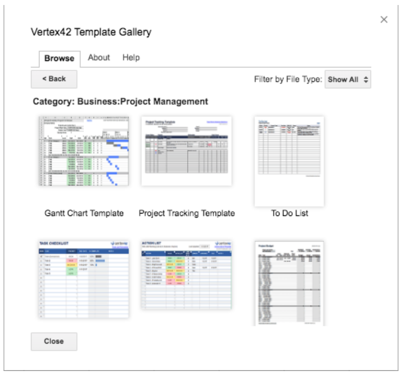

Figure 6. Templates available through Vertex Template Gallery

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:[1]

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:[2]

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.

Learning Objectives

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.

1. Ansaldo, Michael. "Microsoft Excel vs. Google Sheets: The 4 key ways Sheets beats Excel." *PCWorld*. Sep 28, 2015. Web. 12 June 2018. ↩
2. Ibid. ↩

Contributors and Attributions

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SECTION OVERVIEW

4.7: Visual Media

4.7.1: Tables, Charts, and Infographics

Learning Outcome

- Discuss the appropriate use of common 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

https://assessments.lumenlearning.co...sessments/8566

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.

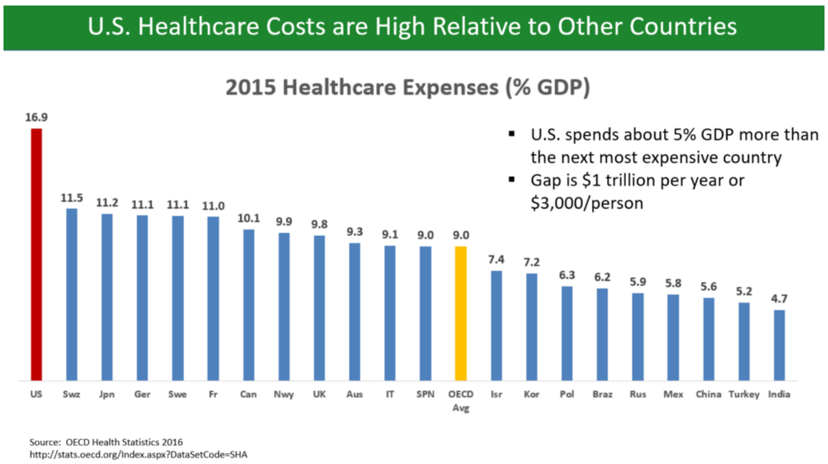


Figure 1. An example of a bar graph

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.

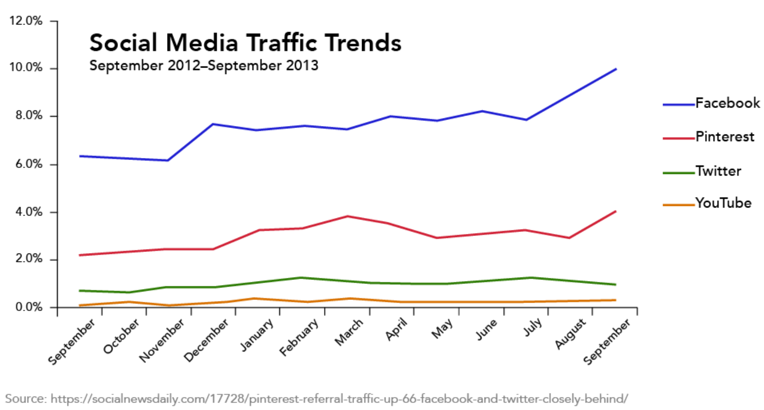


Figure 2. An example of a line graph

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

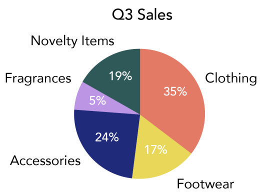


Figure 3. An example of a pie chart

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.

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.

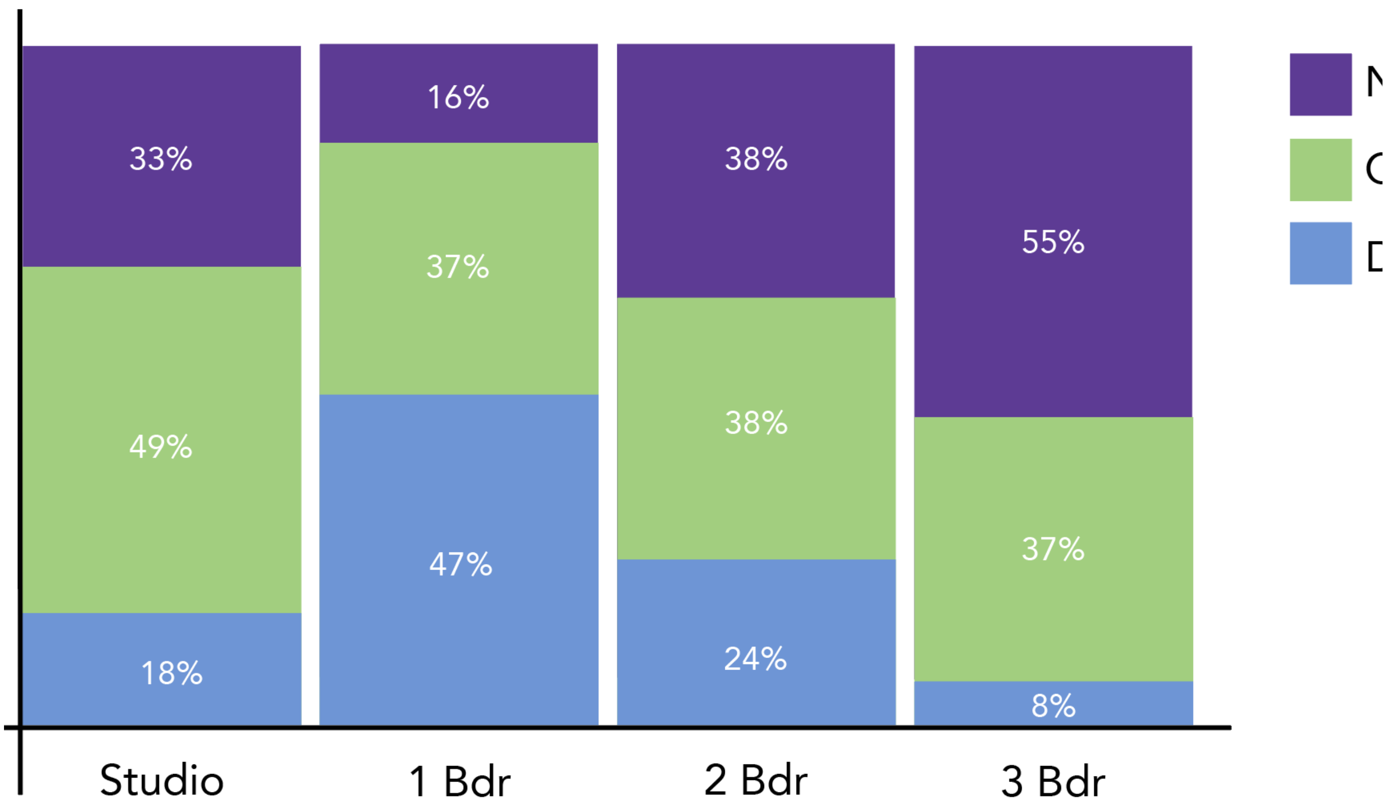


Figure 4. An example of a stacked bar graph

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.

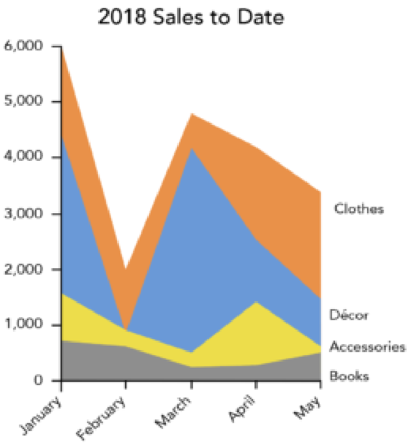


Figure 5. An example of a stacked line graph

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.

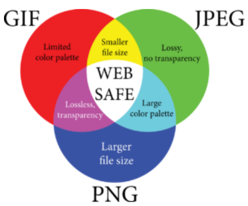


Figure 6. An example of a Venn diagram

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.

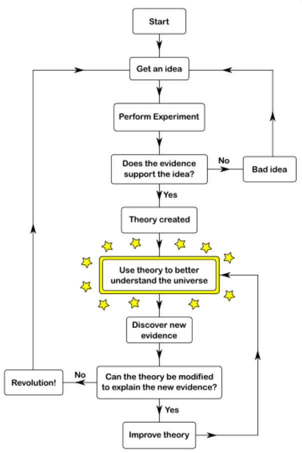


Figure 7. An example of a flow chart

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.

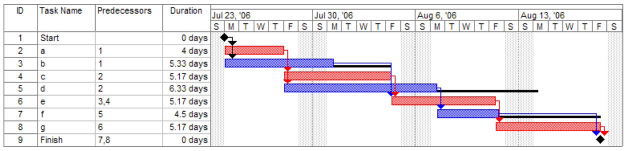


Figure 8. An example of a Gantt chart

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.

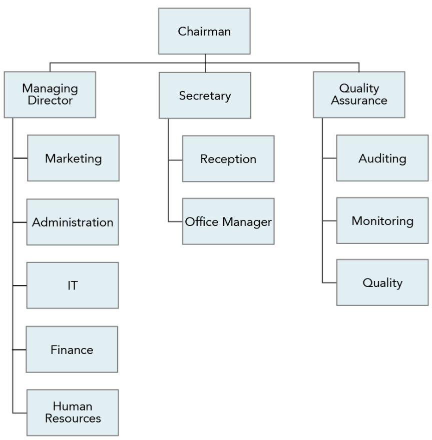


Figure 9. An example of an organizational chart

Pictographs

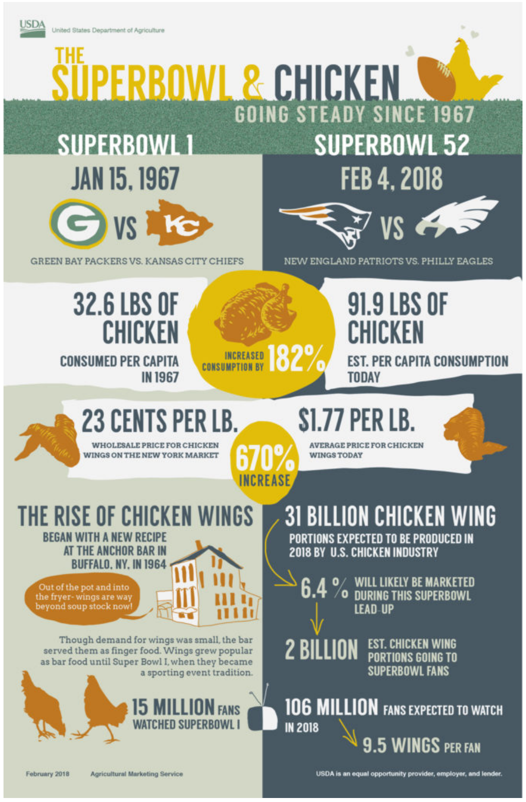
Pictographs use symbols and images to convey data, information, or ideas. The pictographs in Figure 9 are actually part of a resume and signal what kind of information can be found next to each pictograph (phone number, address, Twitter handle, and email respectively).

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.



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*

*Participants in this survey were asked to rate speakers on a scale of 1–10.

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.

4.7.2: Matching Graphics and Objectives

Learning Outcome

- Describe factors in deciding which type of visual aid and graphic will best report your data

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.

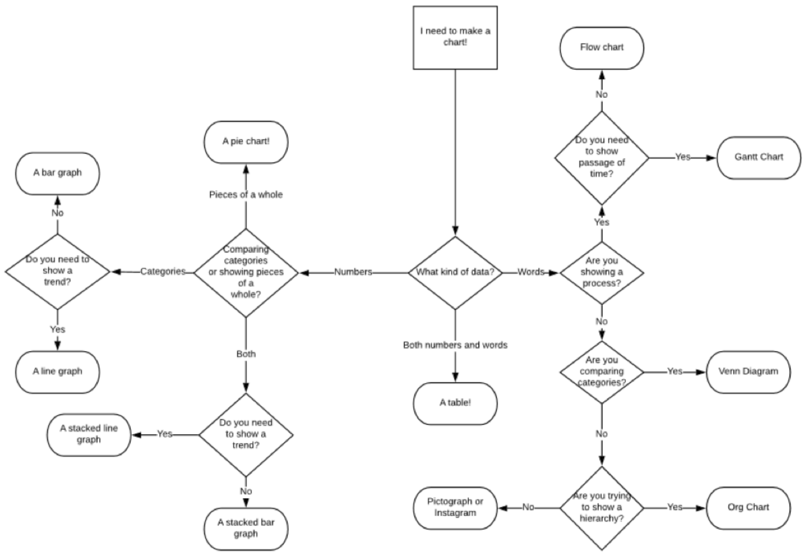


Figure 1. What type of visual aid should I use? Click on the image for a text-only version of this chart.

Now, was that easier than writing it all out?

Practice Question

https://assessments.lumenlearning.co...sessments/8567

4.7.3: Placement, Style, and Coloring

Learning Outcome

- Describe the impact of placement, style, and coloring when incorporating graphics into a message

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:

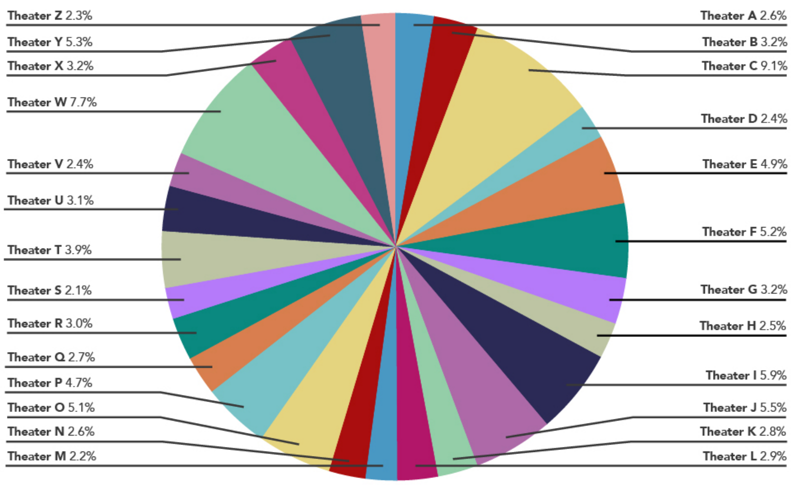


Figure 1. Which employees attend which theaters?

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:

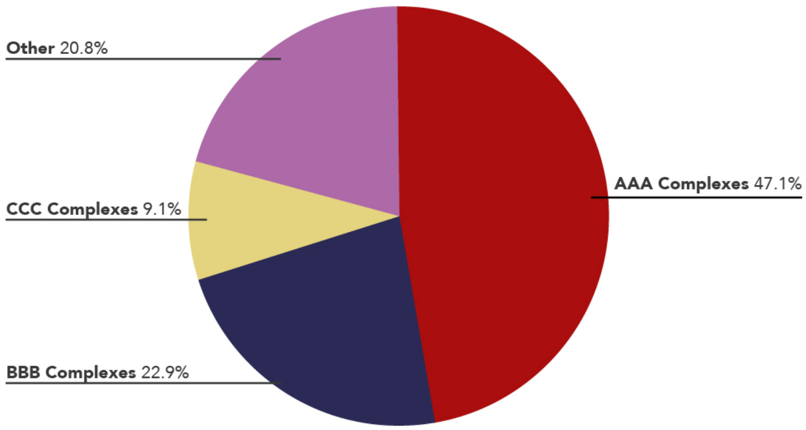


Figure 2. Which employees attend which theaters (by company)?

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:

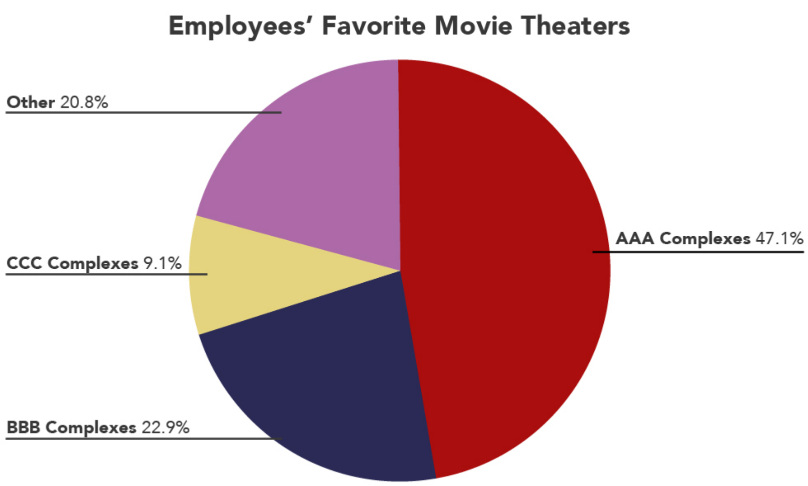


Figure 3: Your completed pie chart

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

https://assessments.lumenlearning.co...sessments/8568

Additional Resources

- Misleading Graphs: Real Life Examples
- Good Data, Bad Graphs

4.7.4: Captions and Titles

Learning Outcome

- Describe the impact of descriptive captions and titles when incorporating graphics into a message

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:

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=244

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

https://assessments.lumenlearning.co...sessments/8569

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.

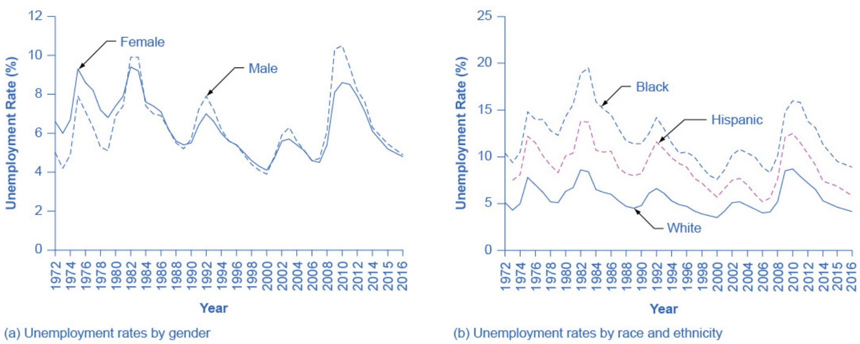


Figure 1. Unemployment Rate by Demographic Group.(a) By gender, 1972–2016. Unemployment rates for men used to be lower than unemployment rates for women, but in recent decades, the two have been very close, often—and especially during and soon after the Great Recession—with the unemployment rate for men somewhat higher. **(b) By race and ethnicity, 1972–2016.** Although unempl 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):

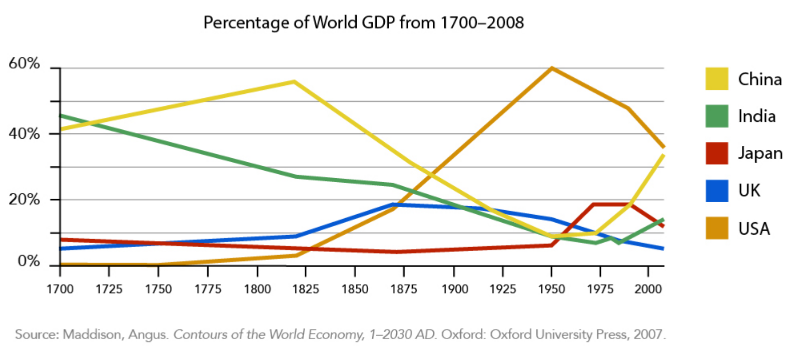


Figure 2. Percentage of World GPD from 1700–2008

Imagine if the graph above, which shows the percent of the world's gross domestic product from 1700–2000, looked more like Figure 3:

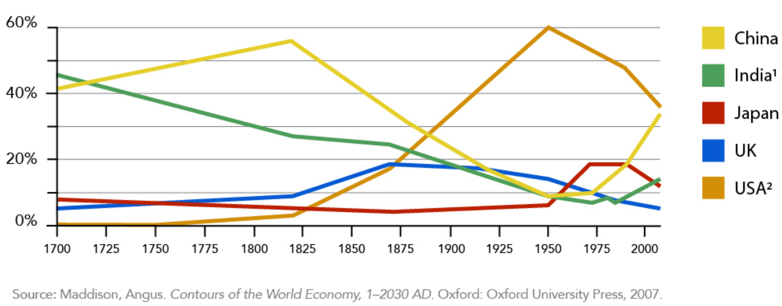


Figure 3. Percentage of World Gross Domestic Product by Country. You will note that (1) India was officially under British rule starting in 1858, when their entire GDP was transferred to the UK. India gained its Independence in 1947 after WWII. (2) The US was colonized by the British and was not its 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?

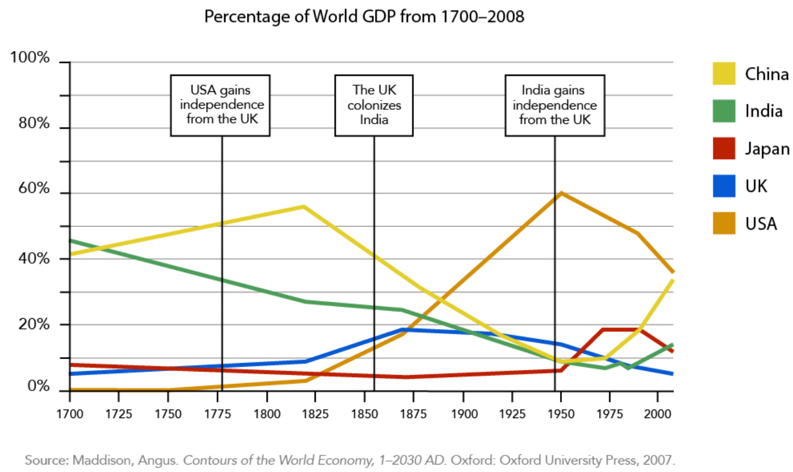


Figure 4. It should be noted that India's GDP was actually considered in the UK's totals from 1858 to 1947.

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).

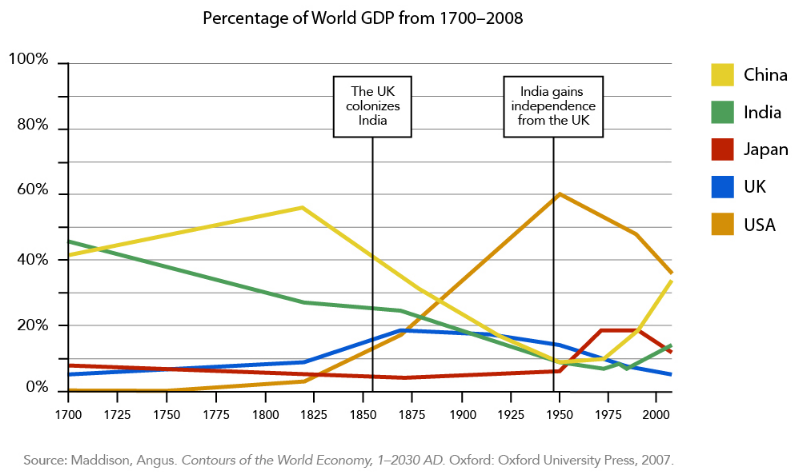


Figure 5. It should be noted that India's GDP was actually considered in the UK's totals from 1858 to 1947.

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.

4.7.5: Introduction to 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.

4.7.6: Video as a Visual Aid

Learning Outcome

- Discuss the pros and cons of using videos 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

https://assessments.lumenlearning.co...sessments/8570

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.

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=248

4.7.7: Designing a Video for Your Needs

Learning Outcome

- Describe the process of planning, designing, and producing a video as a visual aid

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:

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=250

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

https://assessments.lumenlearning.co...sessments/8571

4.7.8: Products and Resources for Creating Videos

Learning Outcome

- Describe the process of planning, designing, and producing a video as a visual aid

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.

4.7.9: Introduction to 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.

4.7.10: Accessibility Matters

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

https://assessments.lumenlearning.co...sessments/8572

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:

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=256

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

https://assessments.lumenlearning.co...sessments/8573

4.7.11: 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.[1]
- People follow written directions 323 percent better when the images accompany the instructions.[2]

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.[3]

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.[4]
- Facebook audiences are 651 percent more likely to engage with a post if it includes an image, compared with posts that don't.[5]

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.

1. Dowse, R. & Ehlers, M. (2005). Medicine labels incorporating pictograms: Do they influence understanding and adherence?, Patient Education and Counseling, Vol 58, Issue 1. ↵
2. Levie, W. J. & Lentz, R. (1982). Effects of text illustrations: A review of research, Educational Communication and Technology. ↵
3. Wharton School of Business. 'Effectiveness of Visual Language'. ↵
4. Green, R. (1989). The Persuasive Properties of Color, Marketing Communications. ↵
5. Social Intelligence Report, Adobe Digital Index Q4 2013 ↵

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4.7.12: Introduction to Using Visuals

What you'll learn to do: Incorporate 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.

4.7.13: Visuals in a Report

Learning Outcome

- Identify appropriate and professional visual representations of information for a business 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

https://assessments.lumenlearning.co...sessments/8574

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 Nestle's 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. Microsoft's 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.

4.7.14: Increasing Impact with Media

Learning Outcome

- Identify effective use of visual media in presentations, documents, spreadsheets, and messages

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.

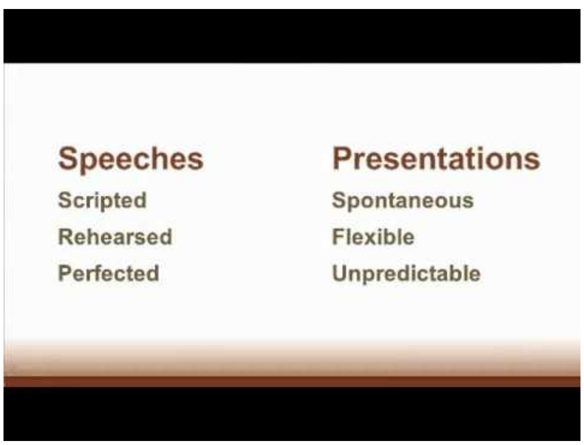
If you try to pound a nail in with the claw side of a hammer—or worse yet, with the handle of a screwdriver—do you blame the tool? No, of course not. Blaming PowerPoint for dull presentations and even duller presenters doesn't get at the core issue. Even when the software could practically construct 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.**

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=262

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

https://assessments.lumenlearning.co...sessments/8575

4.7.15: Revising and Enhancing Visual Media for Impact

Learning Outcome

- Describe the process of revising and enhancing visual media to create impact

Figure 1. Simple and clear visuals can help you communicate complex ideas

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?

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

4.7.16: Evaluating the Effectiveness of your Message

Learning Outcome

- Evaluate the effectiveness of a 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

https://assessments.lumenlearning.co...essments/10144

4.7.17: 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

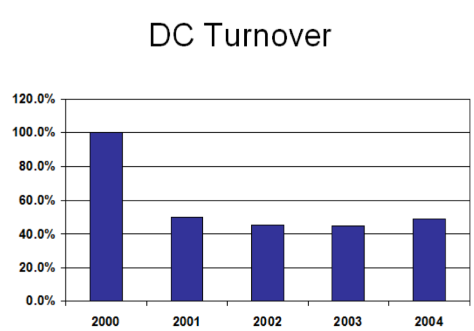
Now it's time to put all of these tools to work for you.

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.

4.7.18: Discussion- Visual Media

Effective images function by communicating the intended message of the brand or mission of a company. A visual analysis can help you explore the effectiveness of images used in a business context to begin to see how they might be interpreted differently by customers with different backgrounds.

Part 1: Visual Essay

Your task is to create a visual essay to explore how a topic or idea is communicated through images. A visual essay is a type of visual analysis that explores how images (logos, advertisements, etc.) convey certain messages. These ideas can be at surface level/literal or at a deeper level of meaning that requires the viewer to use context clues and design features to infer the intended message of the image.

What you will do is:

1. Choose one of the following topics or buzzwords: “green” living, fresh, local, savings/discounts, “box store,” online shopping, social media—or choose a retail buzzword you want to explore (be sure to ask your instructor if the term is acceptable).
2. Use the skills you learned in Using Images Legally to search the images tagged with this term.
3. Choose 8–10 images that you feel best convey the search term you chose and express a point of view on the topic.
4. Create a PowerPoint with a title slide and the 8–10 images on the rest of the slides (one image per slide). The images you use should be able to express a point of view on a particular topic all by themselves.

You will present your visual essay to the class. Please email the instructor a copy **before class** on the due date. You will also post your presentation in the discussion board for your classmates to analyze.

Part 2: Peer Feedback

Choose at least two of your classmates’ sets of slides to analyze. Write down the topic you believe they chose and the main argument or message you believe the slides attempt to make. Then, write down support for your argument. Be sure to explain the use of visual design components (contrast, color, repetition, alignment, proximity, audience, purpose, context, etc.) when supporting your argument.

Grading Rubric

Criteria	Not Evident	Developing	Exemplary	Points
Submit your slide deck	**0 pts** No slide deck submitted	**5 pts** Slide deck does not have at least 8 slides	**10 pts** Slide deck has 8–10 slides focused on a central theme	10 pts
Present to the class	**0 pts** No presentation completed	**5 pts** Presentation is disjointed or unprofessional	**10 pts** Presentation is professional and feels cohesive	10 pts
Analyze at least two peers’ presentations	**0 pts** No response to peers	**2 pts** Responded to only one peer	**5 pts** Responded to two peers	5 pts
			Total:	**25 pts**

4.7.19: Assignment- Visual Media

Everyday we encounter hundreds to thousands of visual images, but why do some images stick in our minds while others just get glossed over? Color, positioning, patterns, and repetition are all features that can can be engineered to convey a message within an image. Images play an important role in persuading an audience of a particular message, but a downside to this is that images can be interpreted in various ways based on people’s history and experiences.

Breaking down the design components of an image is also a helpful when you need to design or create an image or logo to convey a message for your own business needs.

Creating a Personal Brand

If you were represented as a logo, what would you look like? Your task is to design a logo using your initials or parts of your name. The logo must visually communicate something about you or represent you. Ask yourself: What do I want to communicate about me? What shapes, forms, fonts, etc. will help to visually communicate my ‘brand’? You can use any digital design tool or hand draw your logo.

You will turn in two things:

1. A short summary (minimum 200 words) describing your process of completing this project and to analyze the choices you made in the final version. You will discuss why you chose a particular logo shape, use of colors, and the reasons for any revisions.
2. Two copies of your logo: a color and a grayscale version.

Assignment Resources

- Watch What makes a truly great logo? (4:44 minutes)
- Read How to Create a Personal Logo That Makes Your Friends Jealous by Vladimir Gendelman and the accompanying infographic: How to Create a Personal Logo that Makes Your Friends Jealous.
- Lists of digital tools and tutorials

Grading Rubric

Criteria	Not Evident	Developing	Exemplary	Points
Turn in short summary essay	**0 pts** Essay not provided	**5 pts** Essay does not meet minimum word requirements	**10 pts** Essay is at least 200 words and describes the design process of the logo	10 pts
Submit color copy of logo	**0 pts** Color logo not provided	**5 pts** Logo does not communicate the ideas described in the essay	**10 pts** Logo communicates ideas described in the essay and is simple enough to be a logo	10 pts
Submit grayscale copy of logo	**0 pts** Grayscale logo not provided	**2 pts** Logo does not communicate the ideas described in the essay	**5 pts** Logo communicates ideas described in the essay and is simple enough to be a logo	5 pts
			Total:	**25 pts**

4.7.20: Introduction to 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.

4.7.21: Using Visual Media Resources

Learning Outcome

- Describe professional standards for using visual media resources for business purposes

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

https://assessments.lumenlearning.co...sessments/8560

4.7.22: Visual Design Principles

Learning Outcome

- Describe basic visual design principles

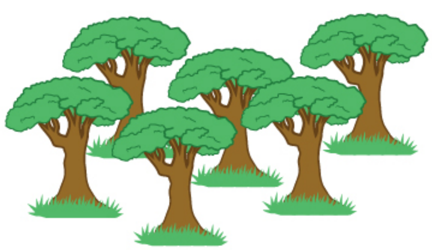
Business communicators don't always have access to a graphic artist. In the event that you as communicator find yourself needing to create visuals that dazzle without the help of a graphic artist, here are a few basic principles of visual design you can keep in your back pocket.

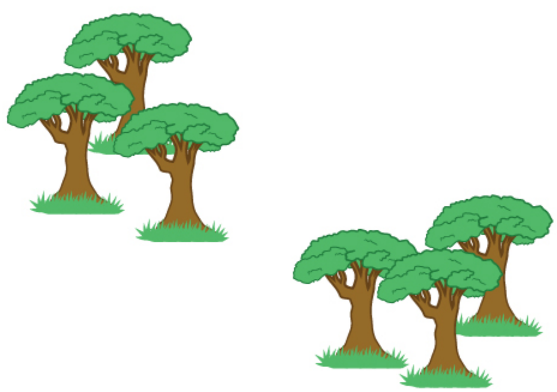
Contrast

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.



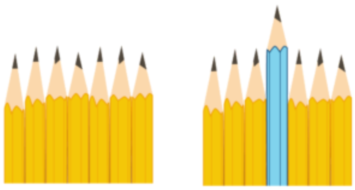


Hierarchy

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.

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=226

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

https://assessments.lumenlearning.co...sessments/8561

https://assessments.lumenlearning.co...sessments/8562

4.7.23: Introduction to 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.

4.7.24: Images Overview

Learning Outcome

- Identify types of images used for business messages

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.[1]

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

https://assessments.lumenlearning.co...sessments/8563

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 Apple’s 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?

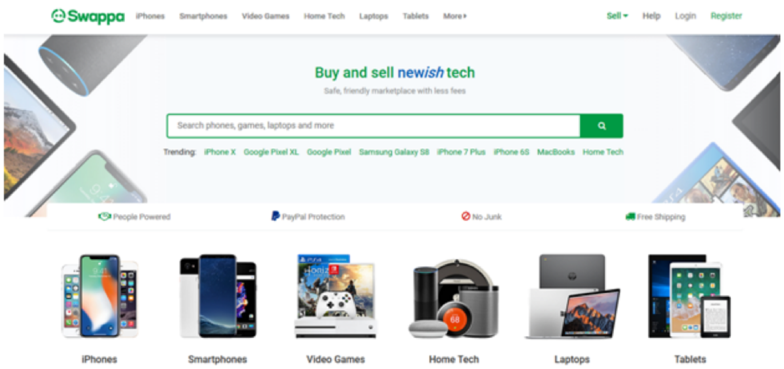


Figure 2. Swappa's website

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?

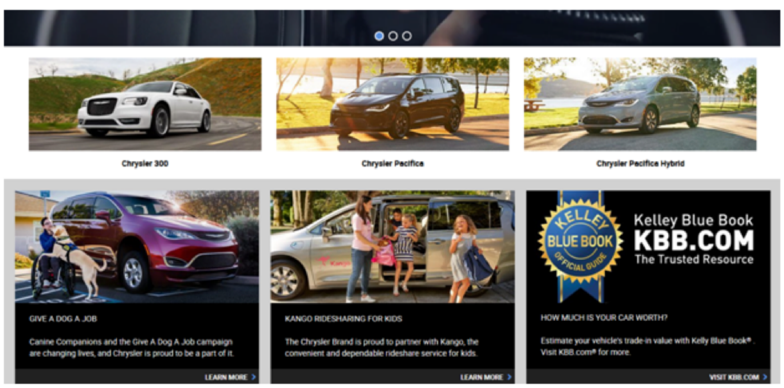


Figure 3. Chrysler's website

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.

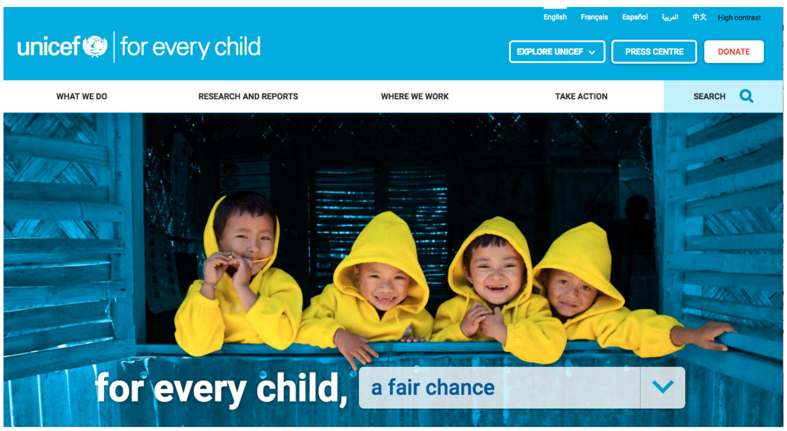


Figure 5. Unicef’s homepage

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.

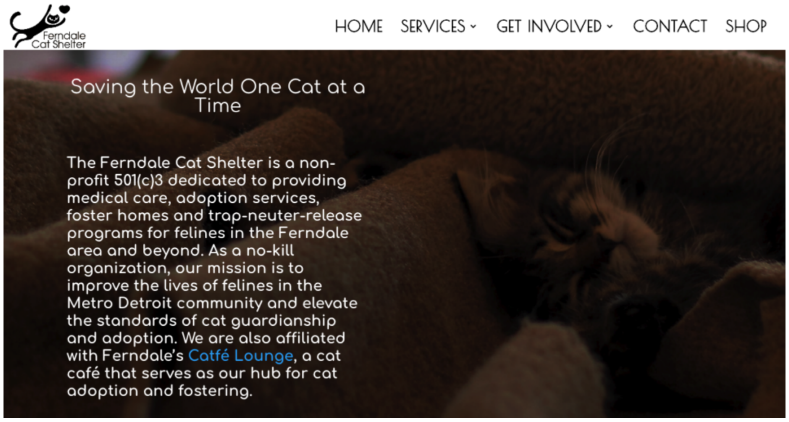


Figure 6. Ferndale Cat Shelter's website

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 can brown 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.

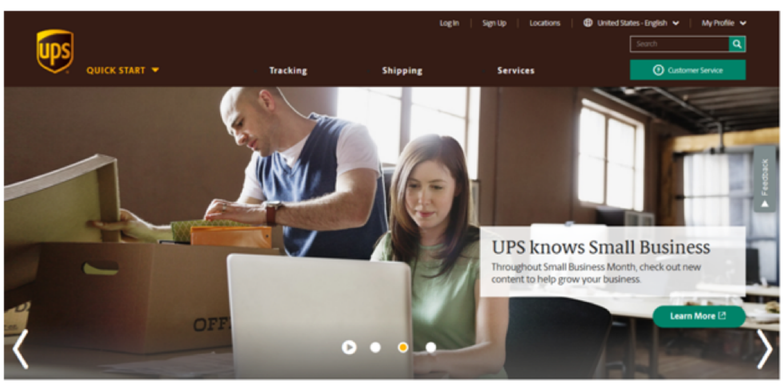


Figure 7. UPS's homepage

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:

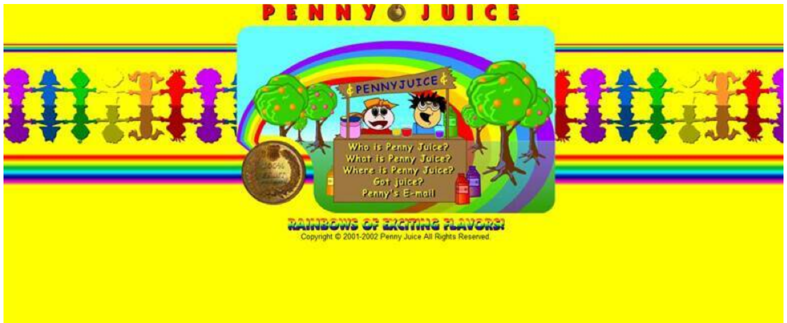


Figure 8. Penny Juice's website

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.

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1. Desmarais, Ellen. "Make Your Content Engagement Skyrocket." *Contently*. 21 Mar 2018. Web. 28 Jun 2018. ↵

4.7.25: Using Images for Impact

Learning Outcome

- Describe how to determine when to use an image and when to use text

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. Watch "Steve Jobs Unveils the Original iPhone" for an example of this presentation style. Most TED Talk speakers follow Steve Jobs's speaking style with regard to visuals. For example, watch Dave Brain's TED Talk "What a Planet Needs to Sustain Life."

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.

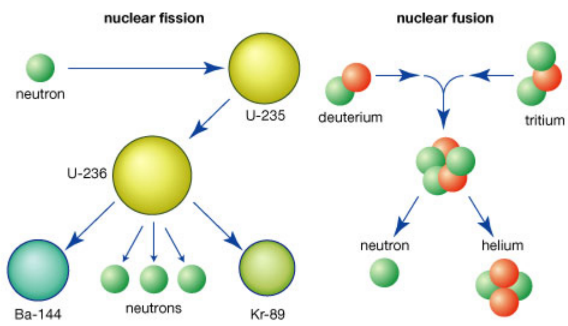

Figure 1. Nuclear fission compared to nuclear fusion

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

https://assessments.lumenlearning.co...sessments/8564

4.7.26: Using Images Legally

Learning Outcome

- Discuss how to legally source images for your communications

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

https://assessments.lumenlearning.co...sessments/8565

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).

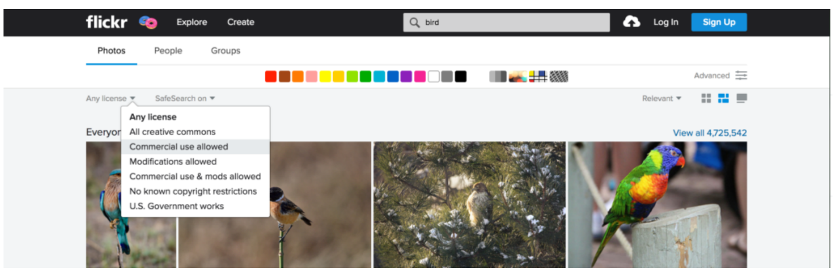

Figure 2. Filtering Flickr for permissions

- 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.

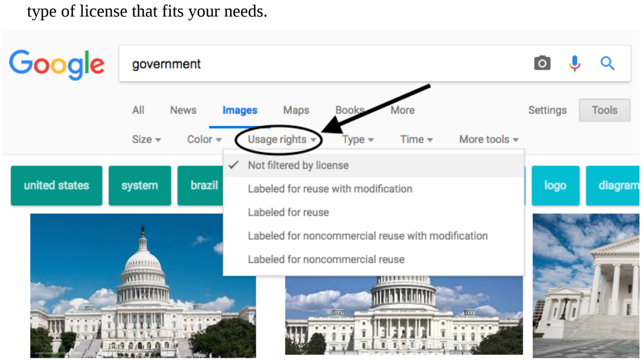

Figure 3. Filtering a Google Image search by license

4.7.27: Introduction to 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.

SECTION OVERVIEW

4.8: Reports

4.8.1: Formal Reports

Learning Objectives

- Define types of formal reports, including proposals
- Discuss different methods of sharing formal reports

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

https://assessments.lumenlearning.co...sessments/8586

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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4.8.2: Sections of Formal Reports

Learning Objectives

- 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

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.

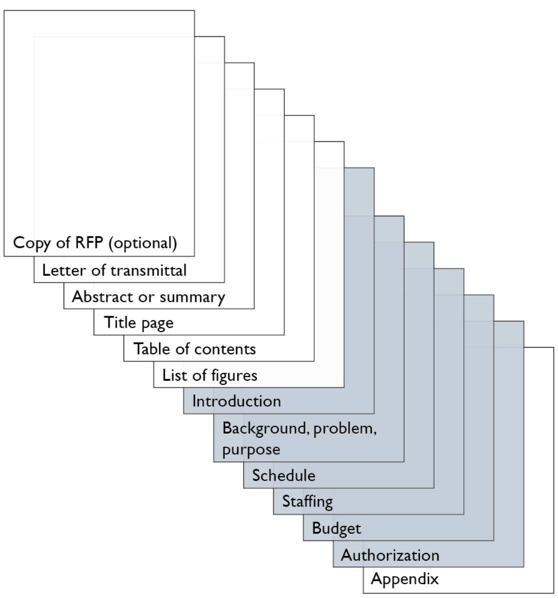

Figure 1. Sections of a Sales Proposal

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4.8.3: Front Sections of a Report

Learning Objectives

- Describe various sections that may be used in the front 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:

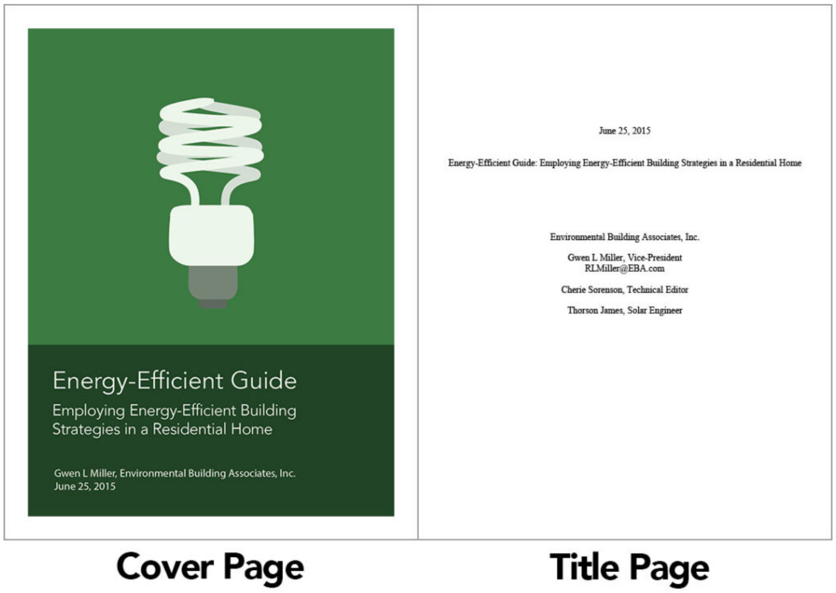


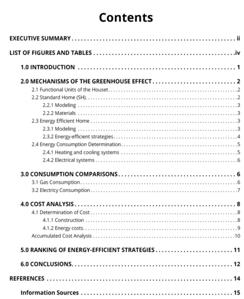
Figure 1. Sample Cover and Title Pages for *Energy-Efficient Guide: Employing Energy-Efficient Building Strategies in a Residential Home*

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.



Contents

Figure 2. Example table of contents. Click to access a PDF of this example.

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.

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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4.8.4: Body Sections of a Report

Learning Objectives

- Describe various sections that may be used in the body 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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4.8.5: Back Matter

Learning Objectives

- Describe various sections that may be used in the 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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4.8.6: Organization of Formal Reports

Learning Objectives

- Determine how to organize an formal report based on audience analysis

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

https://assessments.lumenlearning.co...sessments/8591

A link to an interactive elements can be found at the bottom of this page.

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4.8.7: How to Write a Formal Report

Learning Objectives

- Discuss 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.

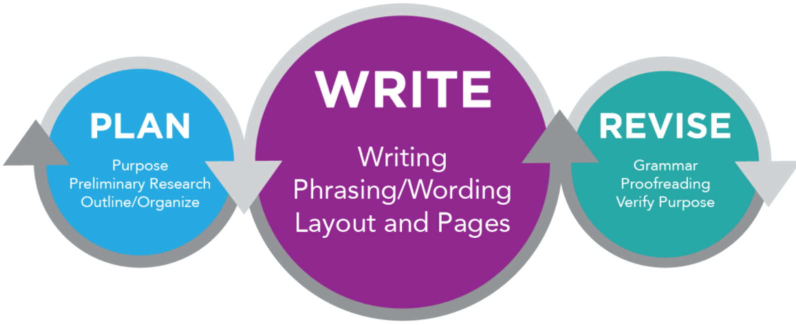

Figure 1.

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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4.8.8: Putting It Together- Reports

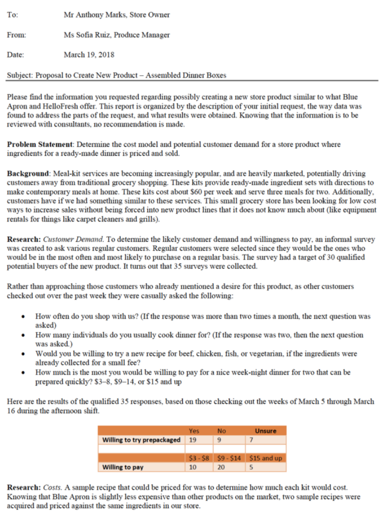
You’ve finally put together your proposal for prepackaged dinner kits. You’re excited that your idea is ready to be reviewed by Mr. Marks, the store owner. You were surprised how long it took to pull this together and keep up on your regular job—two months!

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.”

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4.8.9: Assignment- Reports

At some point in your career, you might find yourself sitting on a committee or leading one. Meeting minutes are a great way to practice report writing since the structure is always linear, meaning the minutes are based on the order in which the events of th meeting unfolded.

Meeting minutes may seem to be insignificant but they are actually official documents of the company and can be subpoenaed as evidence in a court of law. It's important to take careful minutes.

For this assignment, you will watch a video of a mock meeting in the "Watch It" box below. Then create a Word document as the meeting minutes. As you watch the video, focus on applying what you learned about reports to create minutes that summarize essential points. Your meeting minutes should be understandable by another reader months or perhaps even years after the meeting.

You will submit this assignment as a Word attachment to your instructor via email.

Required Information of Meeting Minutes

- Date
- Time of the meeting
- Name of attendees
- Acceptance or corrections to previous meeting minutes
- Actions to be taken including the next steps
- The person assigned to each action
- Checkpoint on tasks/progress
- The voting outcomes (if there are any)

Watch It

This meeting meeting took place on January 28th, 2016, at 3pm EST.

The participant's names are Sarah, Eleanor, and Julie.

Click here to read a transcript of this video.

A link to an interactive elements can be found at the bottom of this page.

Assignment Resources

Do you need additional help with this assignment? Here are some resources:

- Watch this video (or read the transcript): 5 Minutes on Taking Minutes
- Examples of meeting minutes:
  - Wikimedia Foundation Minutes
  - Adoption of Minutes; interviews: discussion
  - OSI Board Meeting Minutes, April 11, 2007

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**2 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**3 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**4 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**5 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**5 pts**
Content	**2 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**3 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**4 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts**
Development – Critical Thinking	**4 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**6 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**8 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**10 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**10 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Grammar, Mechanics, Style	**2 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**3 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**4 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**5 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**5 pts**
				Total:	**25 pts**

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4.8.10: 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 cooks then follow a recipe for a unique meal with a few special ingredients that the company ships to their residence. The home cook doesn't have to go to the store for anything.

When you go to work the next day, you plan to ask the grocery store owner about these services. How hard would it be to create something similar at your 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 small town grocery store. He asks you to put together information that summarizes these answers. He wants to review it with a couple of business friends in his network where they share new ideas and brainstorm business strategies.

This is your first time creating a business report in a real-life business circumstance, and you're excited because it's not just a school assignment. You start with what you were trained to do by 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 focus in mind, you can do the research needed to answer the questions and determine how to share your results in an orderly fashion.

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4.8.11: Introduction to 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.

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4.8.12: Types of Reports

Learning Objectives

- Distinguish between informal and formal reports
- Distinguish between informational and analytical 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

https://assessments.lumenlearning.co...sessments/8578

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

https://assessments.lumenlearning.co...sessments/8579

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4.8.13: Stakeholders

Learning Objectives

- Compare and contrast different type of stakeholders in business reports

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[1]:

- 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

https://assessments.lumenlearning.co...sessments/8580

1. Anderson, Paul V. T*echnical Communication: A Reader-Centered Approach*. Mason, OH: Cengage Learning, 2007. ↵

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4.8.14: Introduction to 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.

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4.8.15: Using Informal Reports

Learning Objectives

- Differentiate among typical types of informal reports
- Discuss different methods of sharing informal reports

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

https://assessments.lumenlearning.co...sessments/8581

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

https://assessments.lumenlearning.co...sessments/8582

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4.8.16: Organizing an Informal Report

Learning Objectives

- Discuss the purpose of common sections of an informal report
- Determine how to organize an informal report based on audience analysis

Sections of Informal Reports

Informal informational reports typically include the following three sections:

- 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

https://assessments.lumenlearning.co...sessments/8583

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

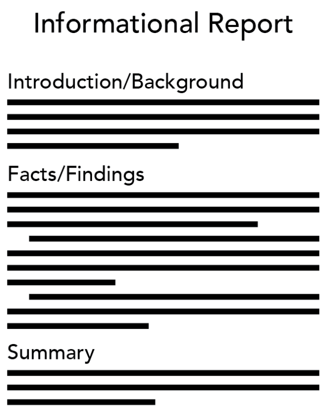

Figure 1. Informational Report Organization

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.

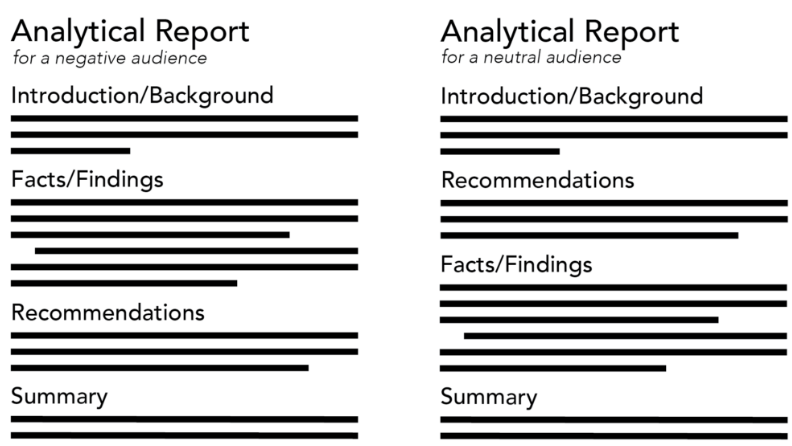

Figure 2. Analytical Report Organization

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.)

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 . . . "

Practice Question

https://assessments.lumenlearning.co...sessments/8584

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4.8.17: How to Write an Informal Report

Learning Objectives

- Discuss 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.

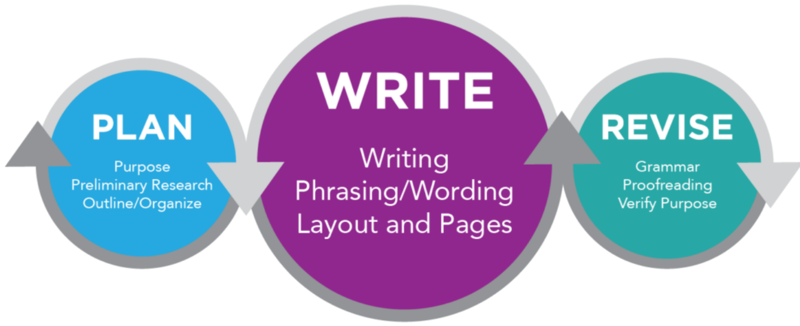


Figure 1.

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

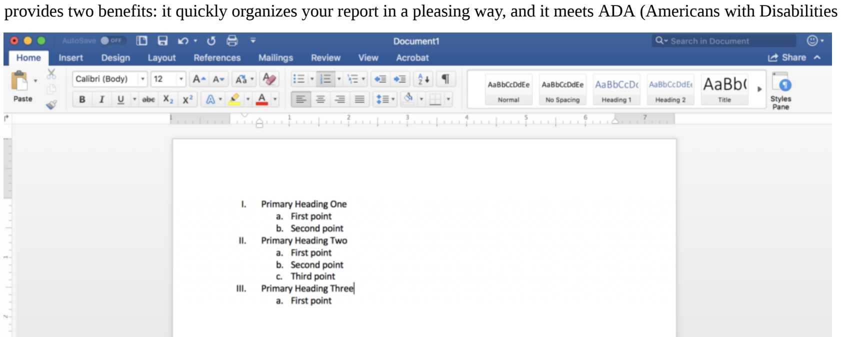
Different companies have different styles for writing reports: you should always match they style of your current institution. Some companies accept a more casual style of writing. This may include the use of personal pronouns such as "I recommend . . . " or "we completed a survey of 20 people." Some 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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4.8.18: Introduction to 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.

Contributors and Attributions

SECTION OVERVIEW

4.9: Public Speaking

4.9.1: How You Speak

Learning Outcomes

- Discuss strategies to effectively use vocal variety to emphasize your message
- Identify types of language to avoid in your speech

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.”[1] In a series of posts on vocal variety, Meikle identifies six key elements, common errors, and good practices to develop greater vocal impact.[2]

- 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.”

Practice Question

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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.”[3] 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?”[4] 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.”

Practice Question

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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:

An interactive or media element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=332

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1. Meikle, Gavin. "Six Elements of Vocal Variety and How to Master Them." *Inter-Activ*. 18 Jun 2017. Web. 25 Jun 2018. ↵
2. Ibid. ↵
3. Anderson, Chris. "TED's secret to great public speaking." *TED*. Mar 2016. Web. 25 Jun 2018 ↵
4. Marshall, Melissa. "Talk Nerdy to Me." *TED*. Jun 2012. Web. 25 Jun 2018 ↵

4.9.2: Introduction to 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.

4.9.3: Audience Attention and Rapport

Learning Outcomes

- Describe techniques to gain and keep an audience's attention

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!

Practice Question

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4.9.4: Audience Participation

Learning Outcomes

- Discuss effective ways to use audience participation
- Discuss appropriate ways to respond to questions without derailing a presentation

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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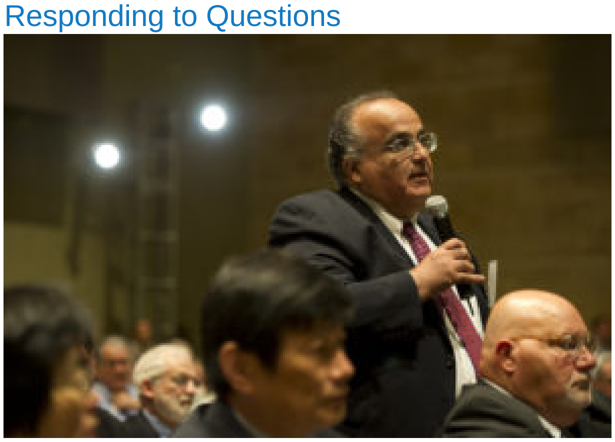
Responding to Questions



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:[1]

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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1. https://www2.le.ac.uk/offices/ld/resources/presentations/questions ↵

4.9.5: Introduction to 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.

4.9.6: Overcoming Fears and Anxiety

Learning Outcomes

- Discuss various strategies for overcoming common fears and anxiety about public speaking

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

https://assessments.lumenlearning.co...sessments/8604

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.

4.9.7: Pro Tips

Learning Outcomes

- Discuss public speaking strategies of effective public speakers

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

https://assessments.lumenlearning.co...sessments/8605

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

4.9.8: 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."

Figure 1. Parkland students at a political rally.

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."

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.

4.9.9: Discussion- Public Speaking

Part 1: Your Presentation

Your task is to create a five minute presentation supported by PowerPoint slides. Imagine you are the general manager of a grocery or clothing store and you are going to conduct a team meeting to teach your staff about a new policy or procedure. Select one of the following topics for your presentation:

- a new loss prevention policy
- a new promotional strategy
- a new cash handling policy

If you wish do present on a different topic you must first get permission from your instructor.

Your PowerPoint presentation should have a minimum of 4 slides: a title page, content slides, and conclusion.You will present your visual essay to the class. Please email the instructor a copy **before class** on the due date. You will also post your presentation in the discussion board for your classmates to provide feedback.

Part 2: Peer Feedback

Choose at least two of your classmates' presentations to review. You will review both their slides and their presentation, so make sure to take notes during your peers' presentations! You will write feedback (minimum 150 words) for each classmate based on the following questions:

- Does the speaker read each slide verbatim or include additional information than the content on the slides?
- Do they have the minimum number of required slides?
- Is there presentation the required length? (5 minutes +/− 30 seconds)?
- How is the speakers volume, speed of speech, and clarity?
- What is successful or unsuccessful about layout and look of the slides?
- Are there any grammatical or spelling errors in the slides?

Grading Rubric

Criteria	Not Evident	Developing	Exemplary	Points
Submit your slide deck	**0 pts** No slide deck submitted	**5 pts** Slide deck does not have at least 4 slides	**10 pts** Slide deck has at least 4 slides focused on a central theme	10 pts
Present within the allotted time	**0 pts** No presentation completed	**5 pts** Presentation is either 30 second under or over 5 minutes	**10 pts** Presentation is within 30 seconds of the required 5-minute length	10 pts
Speak with appropriate volume, speed, and clarity	**0 pts** No presentation completed	**5 pts** Presentation cannot be heard, is too fast or too slow, or cannot be understood	**10 pts** Presentation is spoken at an adequate volume, speed, and clarity	10 pts
Present your slides effectively	**0 pts** No presentation completed	**5 pts** Presentation is disjointed, unprofessional, or too reliant on slide deck text	**10 pts** Presentation is professional and feels cohesive	10 pts
Analyze at least two peers' presentations	**0 pts** No response to peers	**5 pts** Responded to only one peer	**10 pts** Responded to two peers	10 pts
			Total:	**50 pts**

4.9.10: 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 they're a signal of change or a spark that ignites change, 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.

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.

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."[1] 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."[2]

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."[3] 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!

1. King, Martin Luther, Jr. "I Have a Dream." 1963. ↵
2. History.com. "'I Have a Dream' Speech." History.com, 2017. Web. 26 June 2018. ↵
3. Garau, Annie. "History's Most Powerful Speeches Given By Women." All That Is Interesting, 28 Mar 2017. Web. 26 June 2018. ↵

- Image of I Have a Dream speech at the Lincoln Memorial steps. **Authored by**: Paul Ollig. **Provided by**: National Parks Service. **Located at**: https://www.nps.gov/thingstodo/stand-where-martin-luther-king-jr-gave-the-i-have-a-dream-speech.htm. **License**: *Public Domain: No Known Copyright*

4.9.11: Introduction to 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.

4.9.12: What is Public Speaking?

Learning Outcomes

- Discuss key characteristics of 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:[1]

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

https://assessments.lumenlearning.co...sessments/8593

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1. https://www.linkedin.com/pulse/9-characteristics-highly-effective-public-speakers-peter-khoury/ ↵

4.9.13: Benefits of Public Speaking

Learning Outcomes

- Discuss the importance of public speaking in a business setting

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, you'll have to do so 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. In Aristotle's treatise on the art of persuasion titled *Rhetoric*, he 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

https://assessments.lumenlearning.co...sessments/8594

4.9.14: Audience Expectations

Learning Outcomes

- Identify various audience needs and expectations that can be addressed by a speech

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

https://assessments.lumenlearning.co...sessments/8595

4.9.15: Developing an Effective Speech

Learning Outcomes

- Identify the five steps of 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.

U.S. Supreme Court Justice Sonia Sotomayor giving a speech.

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

Choose Your Topic

For perspective on topics, you can scan the 194 topics used by the National Speakers Association (click on "Browse the complete topic list"). 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

https://assessments.lumenlearning.co...sessments/8596

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.

4.9.16: Introduction to 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.

4.9.17: Starting Your Speech

Learning Outcomes

- Discuss effective ways to begin 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."[1] 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.

Practice Question

https://assessments.lumenlearning.co...sessments/8597

1. http://training.npr.org/digital/leads-are-hard-heres-how-to-write-a-good-one/ ↩

4.9.18: Body Language and Gestures

Learning Outcomes

- Discuss strategies to effectively use body language and gestures to emphasize your message

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."[1] In their *Gestures: Your Body Speaks* publication, they identify the following seven benefits of incorporating gestures into your speech:[2]

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."[3]

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.”

Practice Question

https://assessments.lumenlearning.co...sessments/8598

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1. Toastmasters International. *Gestures: Your Body Speaks*, p. 8. 2011. Web. 26 Jun 2018. ↵
2. Ibid. ↵
3. Ibid. ↵

SECTION OVERVIEW

4.10: Developing and Delivering Business Presentations

4.10.1: Text Boxes and Themes

Learning Objectives

- Insert text boxes
- Change presentation themes

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.

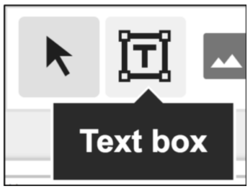


Figure 1.

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.

Practice Question

https://assessments.lumenlearning.co...sessments/8617

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.

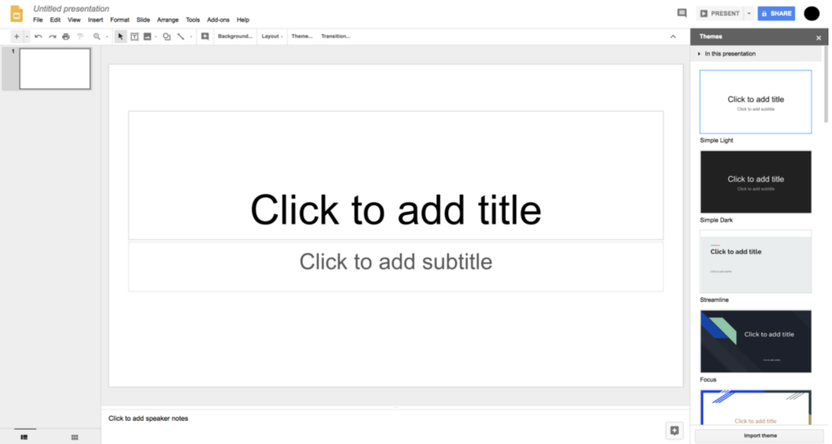


Figure 2.

Practice Question

https://assessments.lumenlearning.co...sessments/8618

4.10.2: Images, Videos, and Arranging Objects

Learning Objectives

- Add images and clip art
- Add videos
- Arrange objects

Images and Clip Art

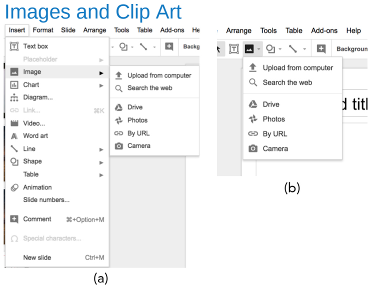


Figure 1.

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).

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.

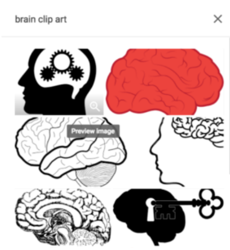


Figure 2.

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.

Practice Question

https://assessments.lumenlearning.co...sessments/8619

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.

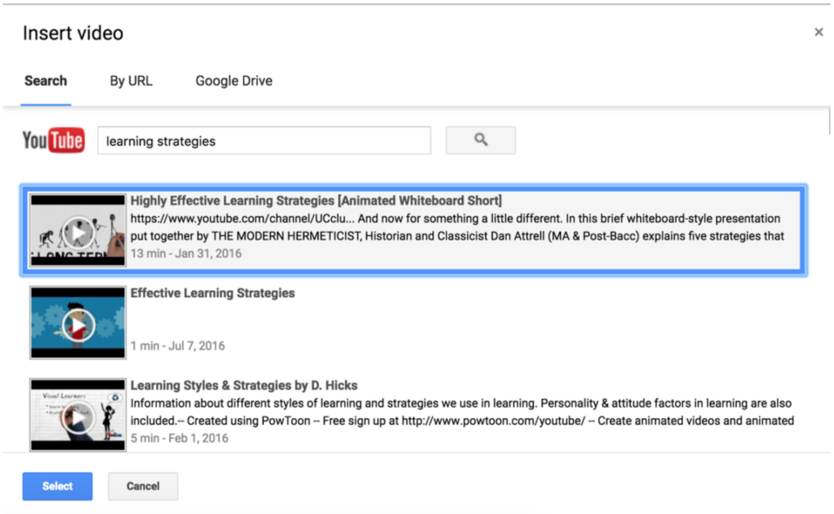


Figure 3.

Practice Question

https://assessments.lumenlearning.co...sessments/8620

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.

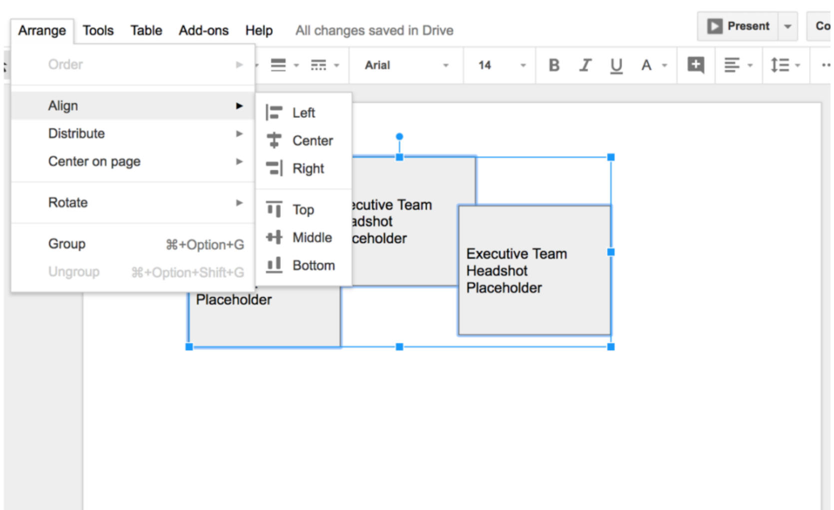


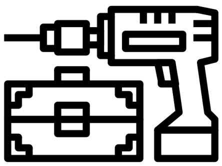
Figure 4.

PRactice Question

https://assessments.lumenlearning.co...sessments/8621

4.10.3: Introduction to 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.

4.10.4: Parts of a Good Presentation

Learning Outcomes

- Identify key features 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.

Figure 1. The WIIFM Principle.

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.

Practice Question

https://assessments.lumenlearning.co...sessments/8622

4.10.5: What's my Presentation About

Learning Outcomes

- Identify the purpose, audience, and message of your presentation

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."[1] 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."[2] 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."[3] 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."[4]

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.”[5] 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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1. Anderson, Chris. “TED’s Secret to Great Public Speaking.” *TED*, March 2016. ↵
2. Adichie, Chimamanda Ngozi. “The danger of a single story.” *TED*, July 2009. ↵
3. Robinson, Ken. “Do schools kill creativity?” *TED*, Feb 2006. ↵
4. Anderson, *TED*↵
5. Anderson, *TED*↵

4.10.6: Bad Presentations

Learning Outcomes

- Discuss common mistakes in 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.

Figure 1. Akhenaten as a sphinx, and was originally found in the city of Amarna.

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.

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."[1] 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."[2]

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."[3] 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."[4]

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.[5]

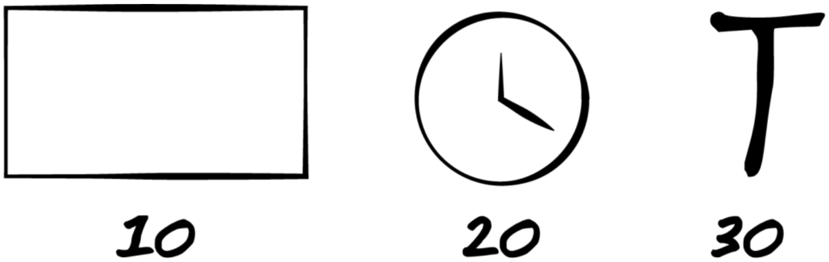

Figure 2. Your presentation should have no more than 10 slides, take no more than 20 minutes, and use type no smaller than 30 point font.

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

https://assessments.lumenlearning.co...sessments/8624

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1. Gallo, Carmine. "How Warren Buffet and Joel Osteen Conquered Their Terrifying Fear of Public Speaking," *Forbes*. May 16, 2013. ↵
2. Rouse, Margaret. "What is death by PowerPoint?" *TechTarget Network*. ↵
3. Reynolds, Garr. “10 tips for Improving Your Presentations Today,” Presentation Zen. Nov 2014. ↵
4. Godin, Seth. *Fix Your Really Bad PowerPoint*. Ebook, sethgodin.com, 2001. ↵
5. Kawasaki, Guy. *The 10/20/30 Rule of PowerPoint*. December 2005. ↵

- Echnaton (Akhenaten) as Sphinx. **Authored by**: Hans Ollermann. **Located at**: https://flic.kr/p/4nvAVm. **License**: *CC BY: Attribution*

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- How to avoid death By PowerPoint. **Authored by**: David JP Phillips. **Provided by**: TED. **Located at**: https://youtu.be/Iwpi1Lm6dFo. **License**: *All Rights Reserved*

4.10.7: Making a Presentation for a Meeting

Learning OUtcomes

- Create a presentation intended for a business 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."

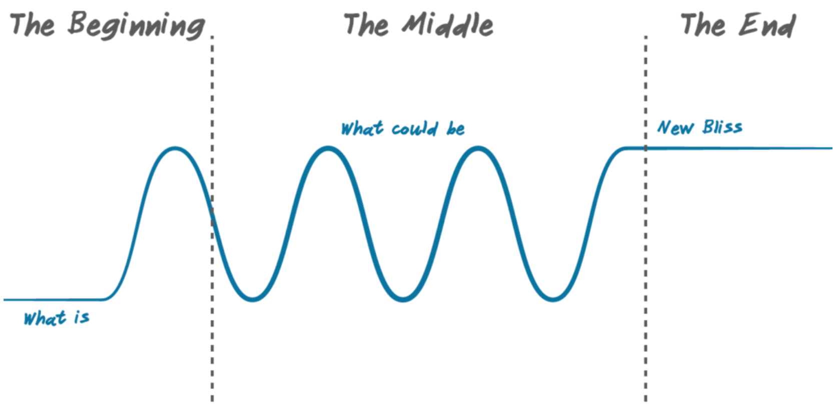

Figure 1. Persuasive story structure (Duarte, "Structure Your Presentation Like a Story," 2012).

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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4.10.8: 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.


Figure 1. We are all storytellers

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).

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.

4.10.9: Assignment- Developing and Delivering Business Presentations

Your task is to revisit the presentation you created for Module 7: Public Speaking and submit a revised final version.

In this version of your presentation you will incorporate the feedback from your peer group and you will use the voice over feature in PowerPoint to narrate your revised presentation.

Along with the narrated slides, you will submit a short essay (minimum 300 words) to document and reflect on any revisions you made based on the peer feedback you received. Please discuss what and why you changed or added anything, and how these changed made the presentation stronger.

Your PowerPoint presentation should have a minimum of 4 slides: a title page, content slides, and conclusion. Each slide you include in the presentation must be narrated using the voice over function. Email a final copy of your presentation and your revision essay to your instructor.

Assignment Resources

- Guide to Record a slide show with narration and slide timings
- Watch: How to create voice-over narration for your PowerPoint Presentation

Grading Rubric

Criteria	Not Evident	Developing	Exemplary	Points
Submit your revised slide deck	**0 pts** No slide deck submitted	**5 pts** Slide deck has not been revised to reflect peer review	**10 pts** Slide deck has been revised to reflect peer review	10 pts
Provided voice over functionality for each slide	**0 pts** No response to peers	**5 pts** Voice over only appears on some slides	**10 pts** Voice over is on all slides	10 pts
Speak with appropriate volume, speed, and clarity	**0 pts** No presentation completed	**5 pts** Presentation cannot be heard, is too fast or too slow, or cannot be understood	**10 pts** Presentation is spoken at an adequate volume, speed, and clarity	10 pts
Present your slides effectively	**0 pts** No presentation completed	**5 pts** Presentation is disjointed, unprofessional, or too reliant on slide deck text	**10 pts** Presentation is professional and feels cohesive	10 pts
Submit reflection essay on slide deck revisions	**0 pts** No essay submitted	**5 pts** Essay is not at least 300 words long	**10 pts** Essay is at least 300 words long, and discusses the improvements made to the slide deck	10 pts
			Total:	**50 pts**

4.10.10: 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."

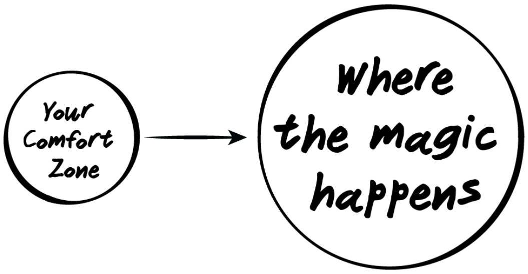


Figure 1. Career moments happen outside of our comfort zone

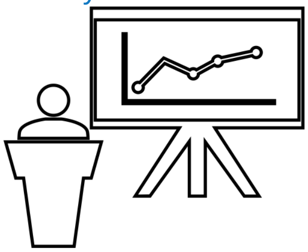
On Monday morning, your hear your manager shattered her leg in a rock-climbing accident over the weekend, and she will be out of commission for three months. When she calls you later that week, you're taut with anticipation—this is your opportunity to step up and demonstrate you have what it takes to 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.

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.

4.10.11: Introduction to 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.

4.10.12: Presentation Tools and Visual Aids

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

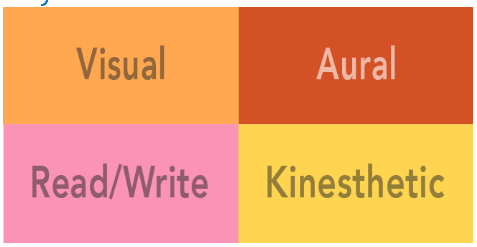


Figure 1. There are four commonly accepted modalities for learning, often abbreviated as VARK.

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.

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.

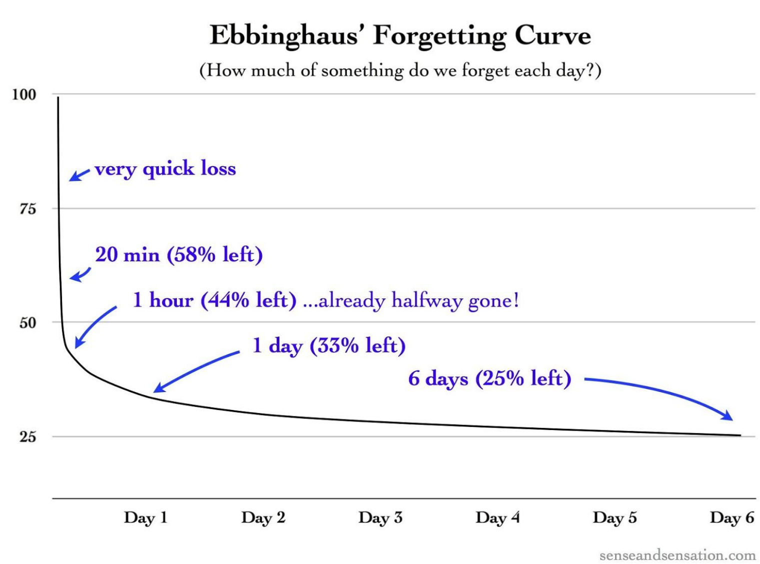


Figure 2. The Forgetting Curve

Practice Questions

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Common Presentation Tools

Figure 3. Infographics can be effective visual aids. Click on the image for a larger view.

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."

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.

4.10.13: Introduction to 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).

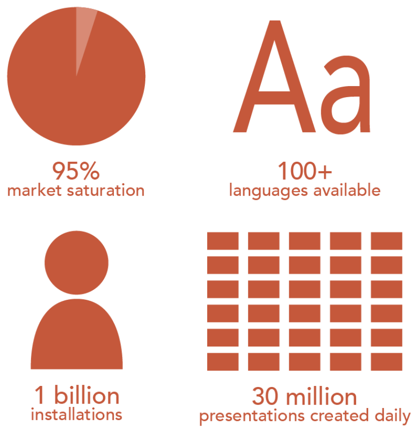
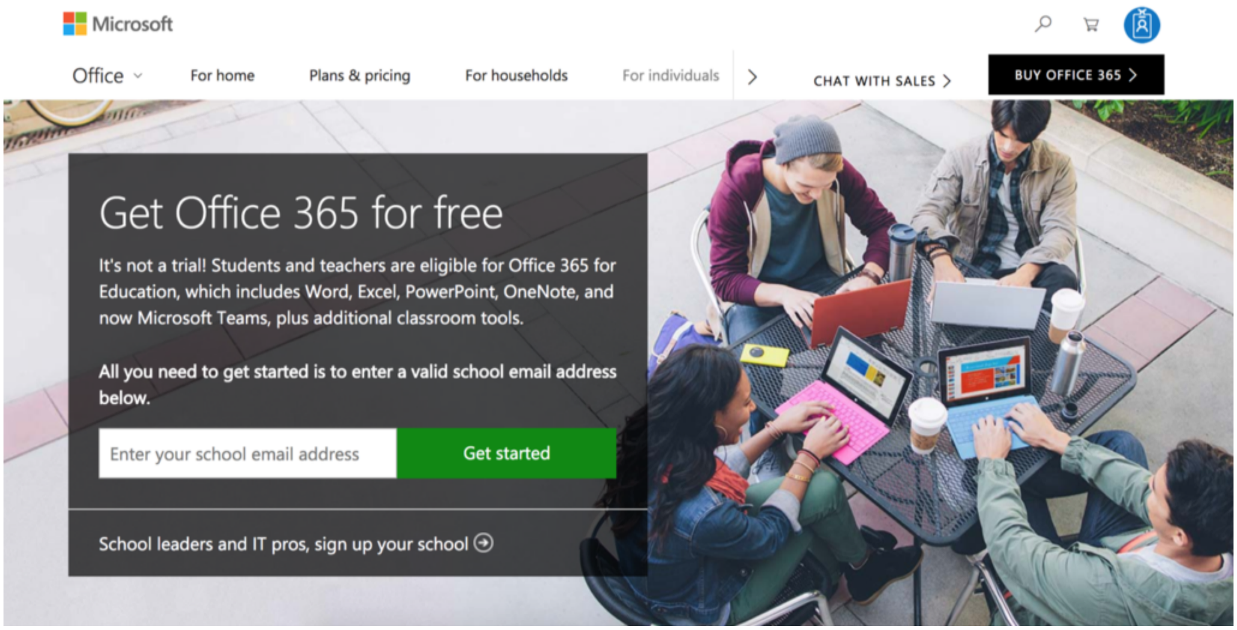


Figure 1. PowerPoint usage statistics

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.

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.


Microsoft
Office
For home
Plans & pricing
For households
For individuals
CHAT WITH SALES
BUY OFFICE 365
Get Office 365 for free
It's not a trial! Students and teachers are eligible for Office 365 for Education, which includes Word, Excel, PowerPoint, OneNote, and now Microsoft Teams, plus additional classroom tools.
All you need to get started is to enter a valid school email address below.
Enter your school email address
Get started
School leaders and IT pros, sign up your school

4.10.14: New Presentations

Learning Outcomes

- Create and save a new presentation

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.

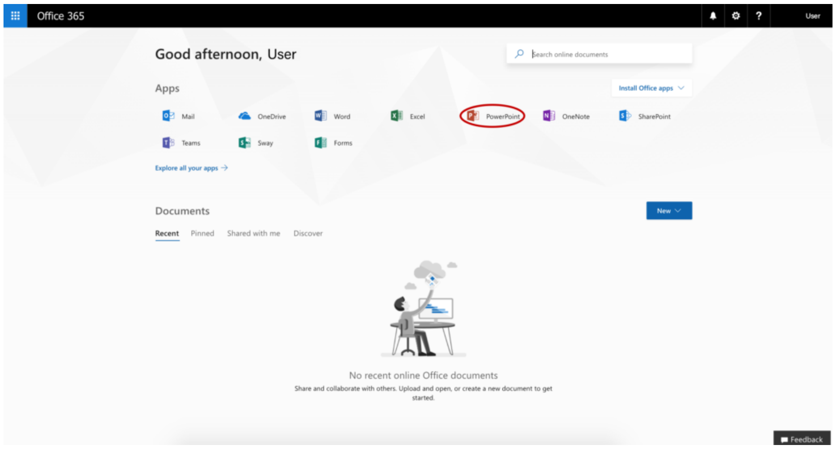


Figure 1. Accessing PowerPoint in Office 365.

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.

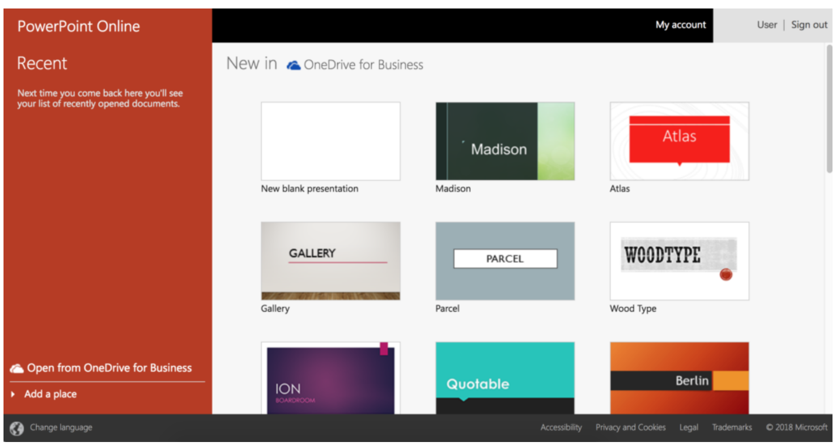


Figure 2. Template gallery.

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.

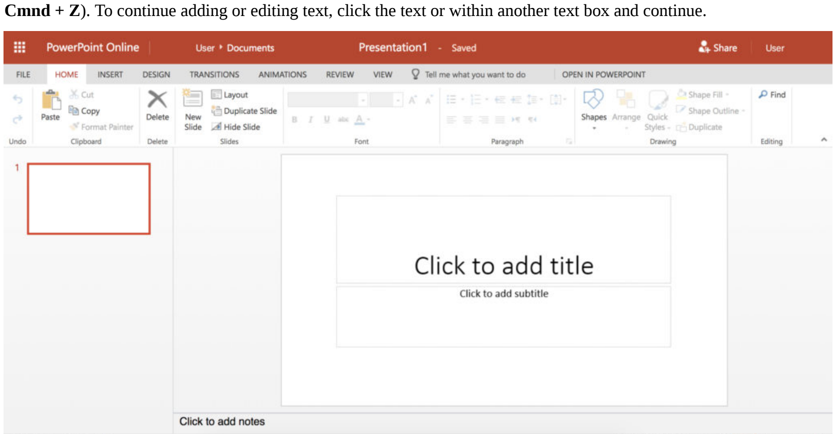


Figure 3. Your new presentation.

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**.

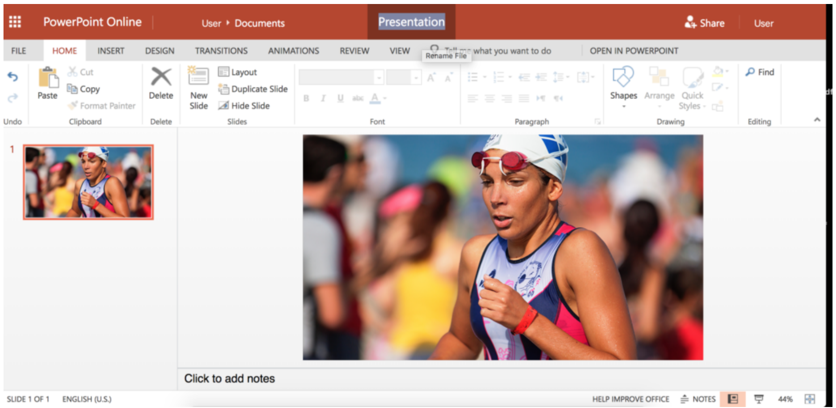


Figure 4.

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.

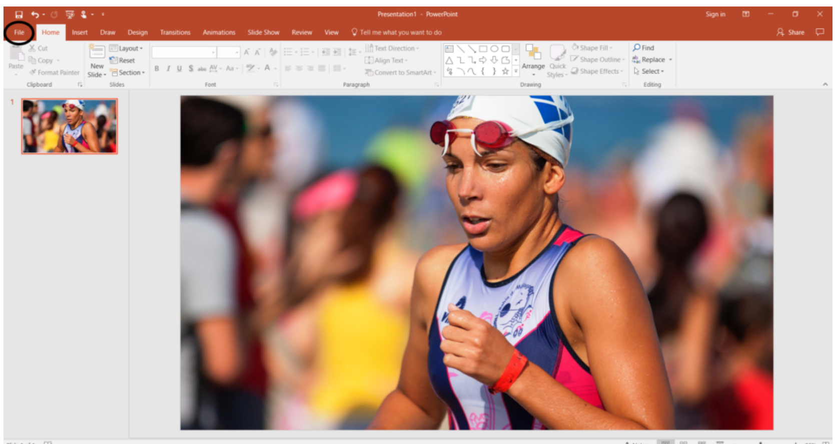


Figure 5.

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).

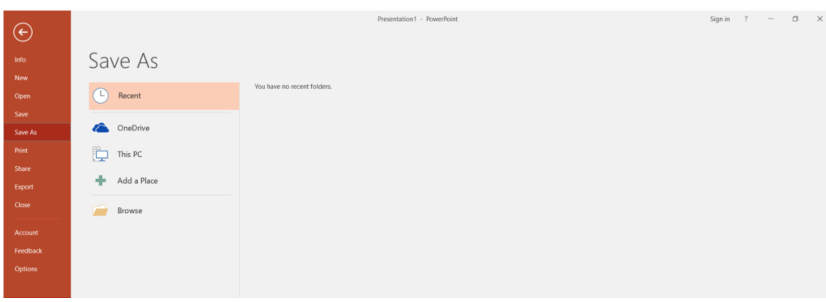


Figure 6.

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

https://assessments.lumenlearning.co...sessments/8608

4.10.15: Editing and Enhancing a PowerPoint Presentation

Learning Outcomes

- Add, delete, and move slides
- Insert text boxes
- Change theme on a presentation

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

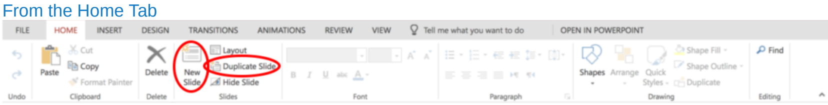
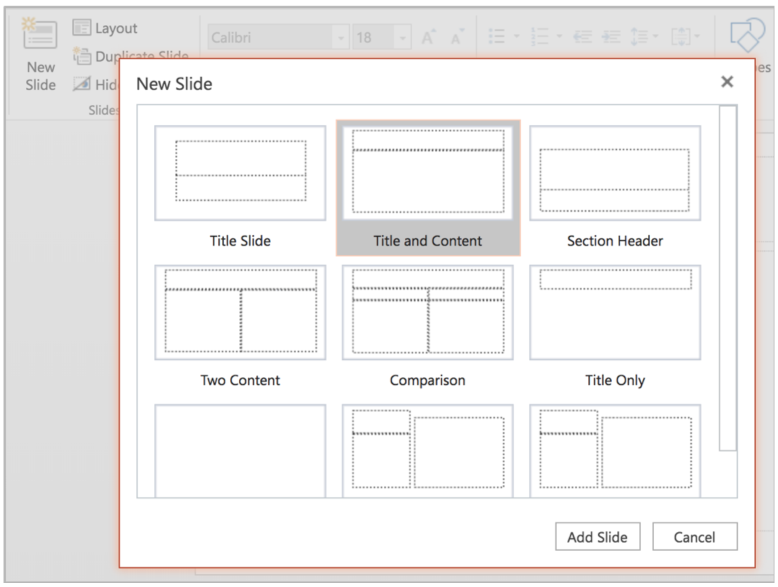
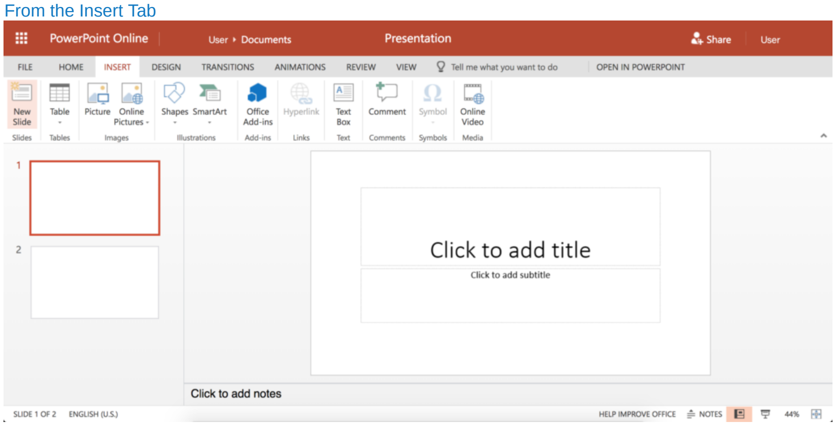


Figure 1. Home Tab.

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**

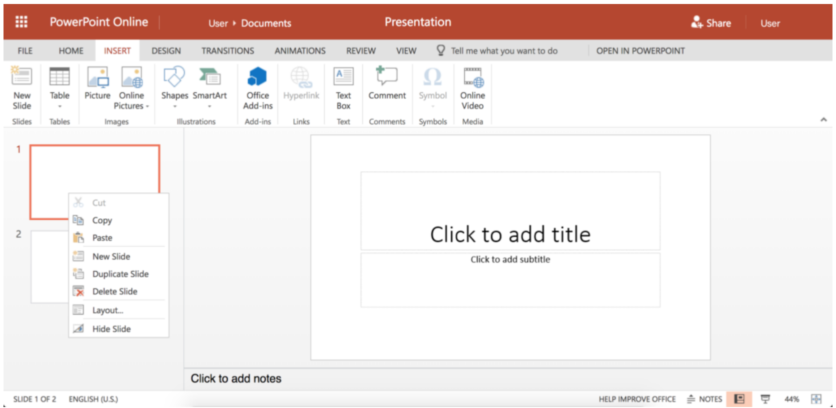


From the Insert Tab



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

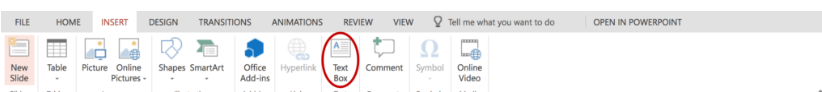
To move a slide, simply drag and drop in the thumbnail frame.

Practice Questions

https://assessments.lumenlearning.co...sessments/8609

Inserting Text Boxes

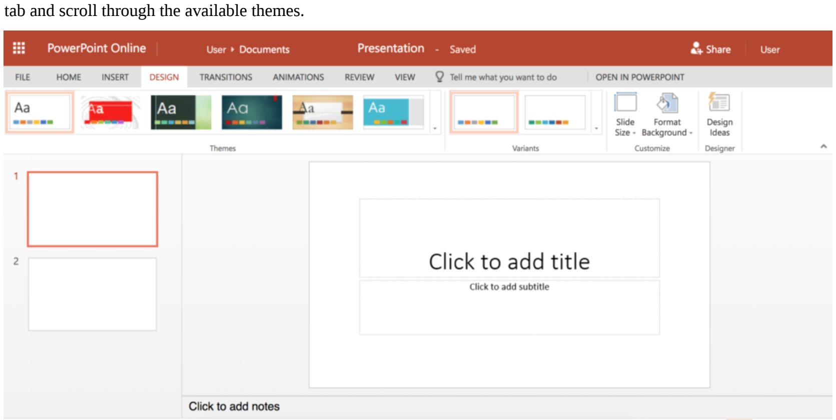
There are multiple ways to insert text into your slides. One of the ways to enter text, as discussed earlier, is to click inside a placeholder box and enter your text. However, you may want to add text to a blank slide or in a place where there is no placeholder. To do so, select the **Insert** tab on 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

https://assessments.lumenlearning.co...sessments/8610

https://assessments.lumenlearning.co...sessments/8611

4.10.16: Visuals- Images, Videos, and Objects

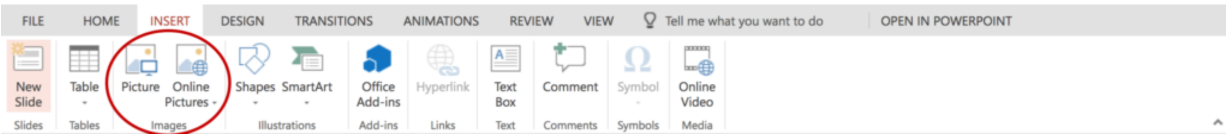
Learning Outcomes

- Add images and clip art
- Add videos
- Arrange objects

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.



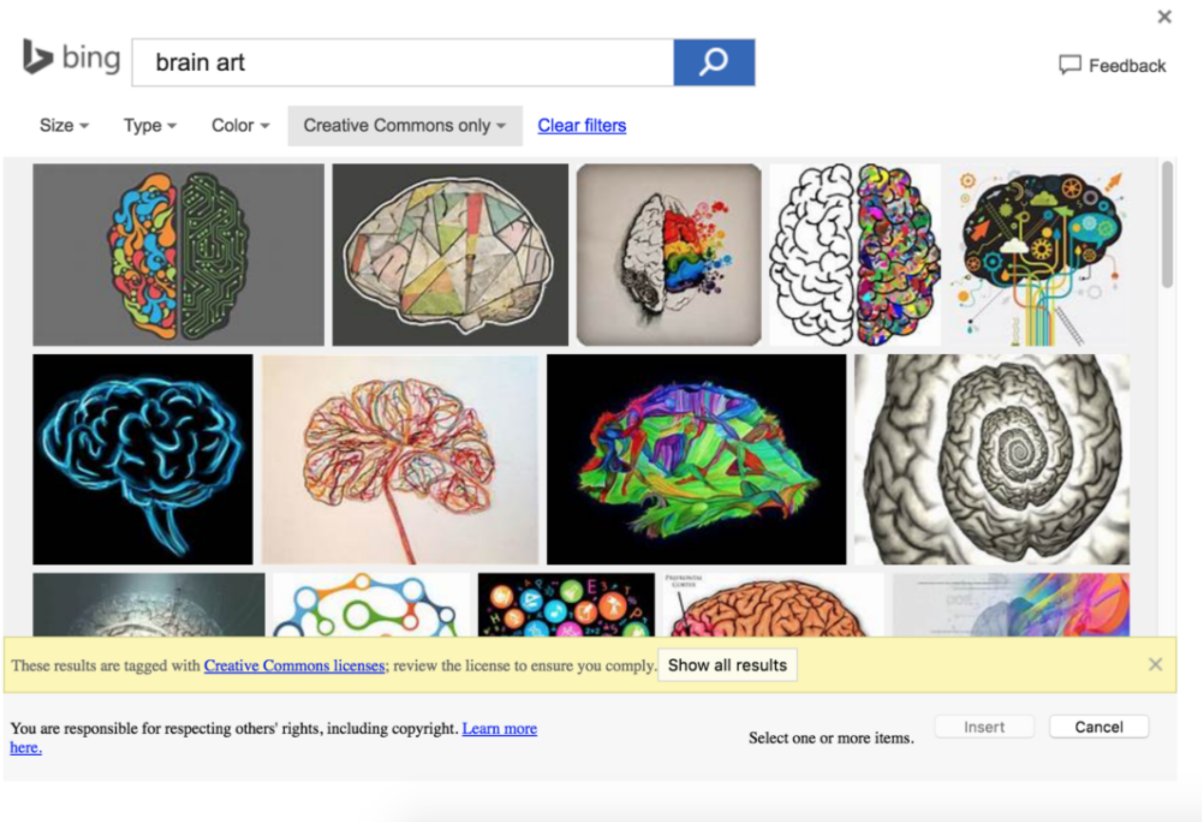
To add pictures from your computer

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 possibilities: 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

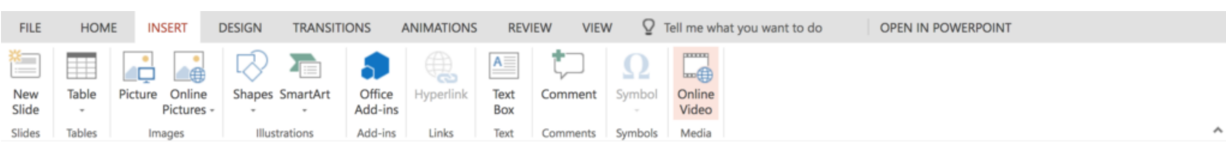


Practice Question

https://assessments.lumenlearning.co...sessments/8612

Adding Videos

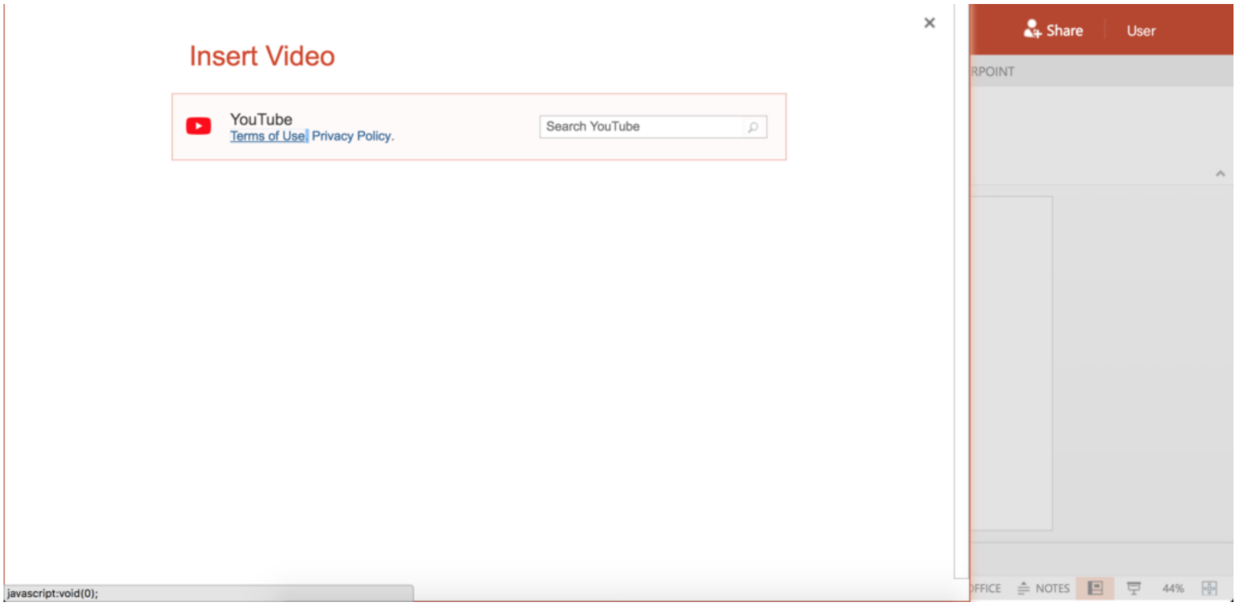
Adding video allows you to incorporate both motion and sound into your presentation and this can translate into audience energy! As with other visual elements, video is an **Insert tab** command.



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

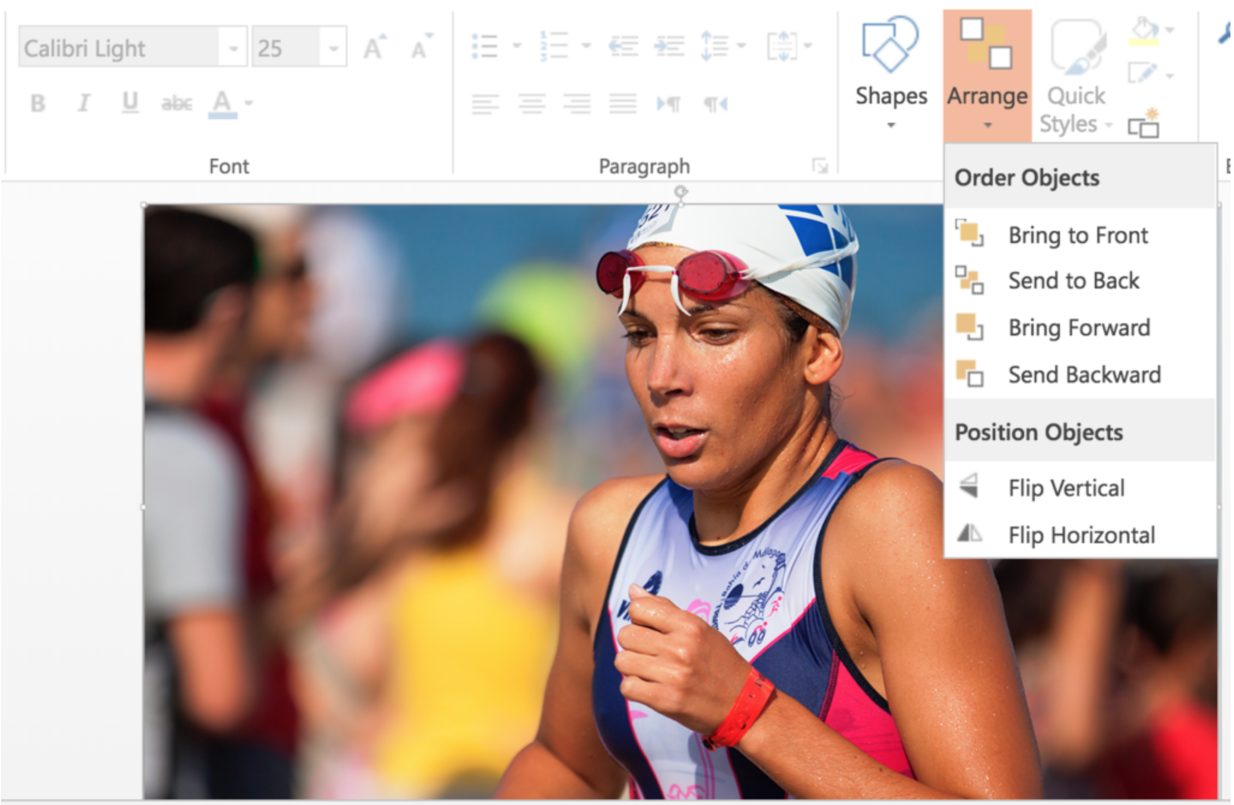


Practice Question

https://assessments.lumenlearning.co...sessments/8613

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

https://assessments.lumenlearning.co...sessments/8614

4.10.17: Introduction to 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.

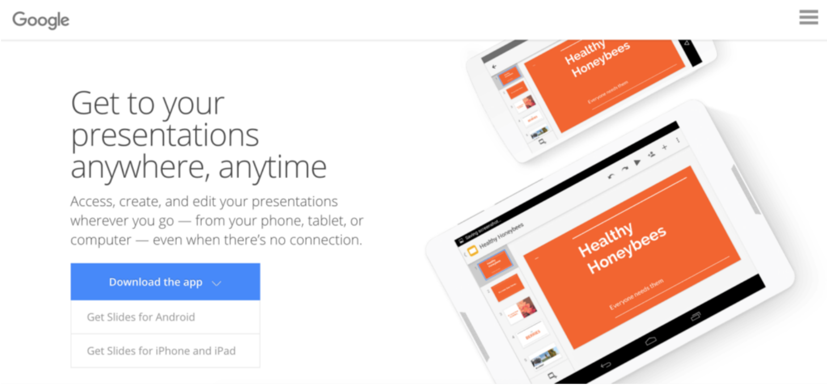


Figure 1.

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!

4.10.18: Creating and Organizing Presentations

Learning OUtcomes

- Create and save a new presentation
- Add, delete, and move slides

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.

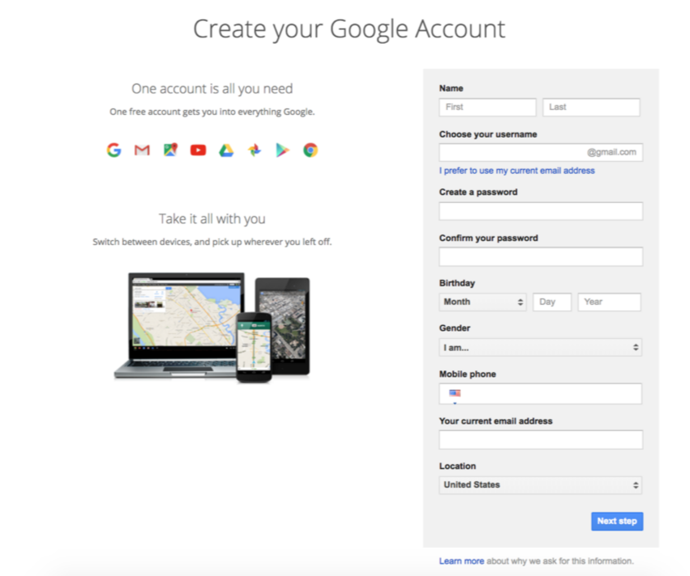


Figure 1.

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.

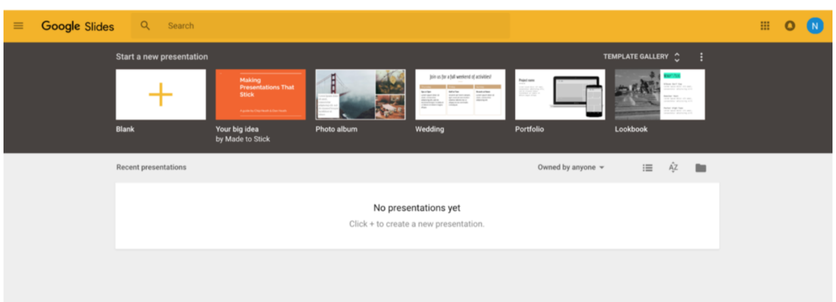


Figure 2.

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).

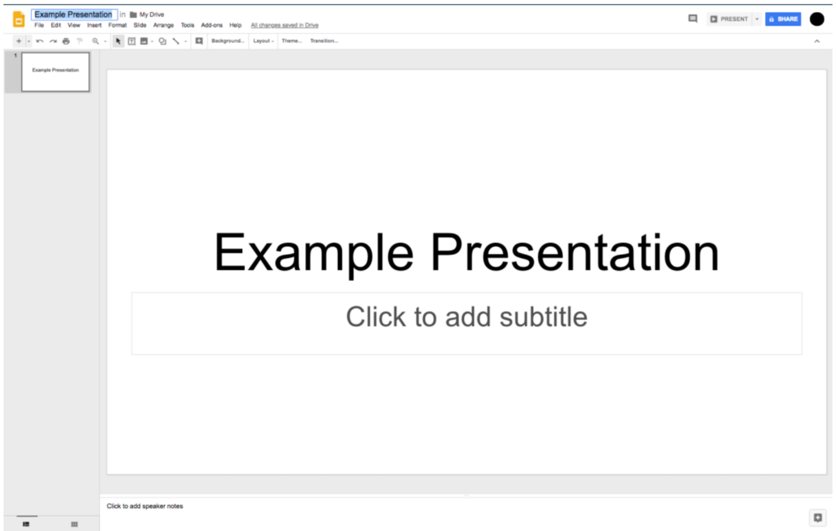


Figure 3.

Practice Question

https://assessments.lumenlearning.co...sessments/8615

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.

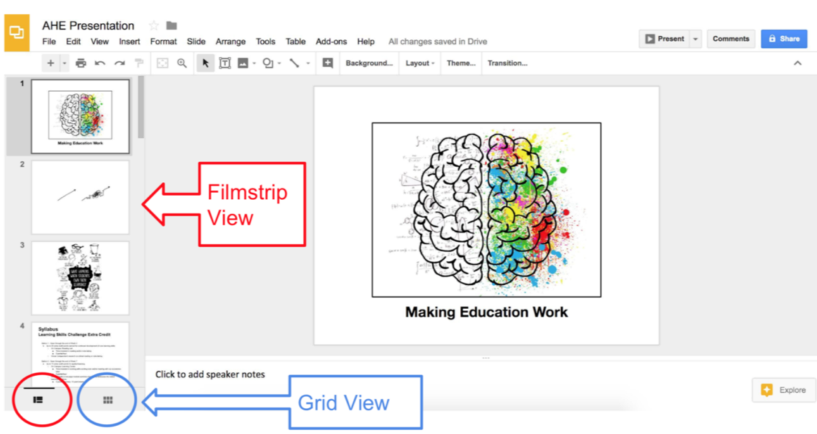


Figure 4.

Try It

https://assessments.lumenlearning.co...sessments/8616

4.11: Gap

CHAPTER OVERVIEW

5: Job Search, Interview, and Recruiting

SECTION OVERVIEW

5.1: Intrapersonal and Interpersonal Business Communication

Thumbnail: pixabay.com/photos/business-...rking-2884023/

5.1.1: Intrapersonal Communication

Learning Objectives

- Discuss intrapersonal communication.

When you answer the question, "What are you doing?" what do you write? Eating at your favorite restaurant? Working on a slow evening? Reading your favorite book on a Kindle? Preferring the feel of paper to keyboard? Reading by candlelight? In each case you are communicating what you are doing, but you may not be communicating why, or what it means to you. That communication may be internal, but is it only an internal communication process?

Intrapersonal communication can be defined as communication with one's self, and that may include self-talk, acts of imagination and visualization, and even recall and memory (McLean, S., 2005). You read on your cell phone screen that your friends are going to have dinner at your favorite restaurant. What comes to mind? Sights, sounds, and scents? Something special that happened the last time you were there? Do you contemplate joining them? Do you start to work out a plan of getting from your present location to the restaurant? Do you send your friends a text asking if they want company? Until the moment when you hit the "send" button, you are communicating with yourself.

Communications expert Leonard Shedletsky examines intrapersonal communication through the eight basic components of the communication process (i.e., source, receiver, message, channel, feedback, environment, context, and interference) as transactional, but all the interaction occurs within the individual (Sheletsky, L. J., 1989). Perhaps, as you consider whether to leave your present location and join your friends at the restaurant, you are aware of all the work that sits in front of you. You may hear the voice of your boss, or perhaps of one of your parents, admonishing you about personal responsibility and duty. On the other hand, you may imagine the friends at the restaurant saying something to the effect of "you deserve some time off!"

At the same time as you argue with yourself, Judy Pearson and Paul Nelson would be quick to add that intrapersonal communication is not only your internal monologue but also involves your efforts to plan how to get to the restaurant (Pearson, J. and Nelson, P., 1985). From planning to problem solving, internal conflict resolution, and evaluations and judgments of self and others, we communicate with ourselves through intrapersonal communication.

All this interaction takes place in the mind without externalization, and all of it relies on previous interaction with the external world. If you had been born in a different country, to different parents, what language would you speak? What language would you think in? What would you value, what would be important to you, and what would not? Even as you argue to yourself whether the prospect of joining your friends at the restaurant overcomes your need to complete your work, you use language and symbols that were communicated to you. Your language and culture have given you the means to rationalize, act, and answer the question, "What are you doing?" but you are still bound by the expectations of yourself and the others who make up your community.

Key Takeaway

In intrapersonal communication, we communicate with ourselves.

Exercises

1. Describe what you are doing, pretending you are another person observing yourself. Write your observations down or record them with a voice or video recorder. Discuss the exercise with your classmates.
2. Think of a time when you have used self-talk—for example, giving yourself "I can do this!" messages when you are striving to meet a challenge, or "what's the use?" messages when you are discouraged. Did you purposely choose to use self-talk, or did it just happen? Discuss your thoughts with classmates.
3. Take a few minutes and visualize what you would like your life to be like a year from now, or five years from now. Do you think this visualization exercise will influence your actions and decisions in the future? Compare your thoughts with those of your classmates.

References

- McLean, S. (2005). *The basics of interpersonal communication*. Boston, MA: Allyn & Bacon.
- Shedletsky, L. J. (1989). Meaning and mind: An interpersonal approach to human communication. *ERIC Clearinghouse on reading and communication skills*. Bloomington, IN: ERIC.

5.1.2: Self-Concept and Dimensions of Self

Learning Objectives

1. Define and discuss self-concept.

Again we'll return to the question "what are you doing?" as one way to approach self-concept. If we define ourselves through our actions, what might those actions be, and are we no longer ourselves when we no longer engage in those activities? Psychologist Steven Pinker defines the conscious present as about three seconds for most people. Everything else is past or future (Pinker, S., 2009). Who are you at this moment in time, and will the self you become an hour from now be different from the self that is reading this sentence right now?

Just as the communication process is dynamic, not static (i.e., always changing, not staying the same), you too are a dynamic system. Physiologically your body is in a constant state of change as you inhale and exhale air, digest food, and cleanse waste from each cell. Psychologically you are constantly in a state of change as well. Some aspects of your personality and character will be constant, while others will shift and adapt to your environment and context. That complex combination contributes to the self you call you. We may choose to define self as one's own sense of individuality, personal characteristics, motivations, and actions (McLean, S., 2005), but any definition we create will fail to capture who you are, and who you will become.

Self-Concept

Our self-concept is "what we perceive ourselves to be," (McLean, S., 2005) and involves aspects of image and esteem. How we see ourselves and how we feel about ourselves influences how we communicate with others. What you are thinking now and how you communicate impacts and influences how others treat you. Charles Cooley calls this concept the looking-glass self. We look at how others treat us, what they say and how they say it, for clues about how they view us to gain insight into our own identity. Leon Festinger added that we engage in social comparisons, evaluating ourselves in relation to our peers of similar status, similar characteristics, or similar qualities (Festinger, L., 1954).

The ability to think about how, what, and when we think, and why, is critical to intrapersonal communication. Animals may use language and tools, but can they reflect on their own thinking? Self-reflection is a trait that allows us to adapt and change to our context or environment, to accept or reject messages, to examine our concept of ourselves and choose to improve.

Internal monologue refers to the self-talk of intrapersonal communication. It can be a running monologue that is rational and reasonable, or disorganized and illogical. It can interfere with listening to others, impede your ability to focus, and become a barrier to effective communication. Alfred Korzybski suggested that the first step in becoming conscious of how we think and communicate with ourselves was to achieve an inner quietness, in effect "turning off" our internal monologue (Korzybski, A., 1933). Learning to be quiet inside can be a challenge. We can choose to listen to others when they communicate through the written or spoken word while refraining from preparing our responses before they finish their turn is essential. We can take mental note of when we jump to conclusions from only partially attending to the speaker or writer's message. We can choose to listen to others instead of ourselves.

One principle of communication is that interaction is always dynamic and changing. That interaction can be internal, as in intrapersonal communication, but can also be external. We may communicate with one other person and engage in interpersonal communication. If we engage two or more individuals (up to eight normally), group communication is the result. More than eight normally results in subdivisions within the group and a reversion to smaller groups of three to four members (McLean, S., 2005) due to the ever-increasing complexity of the communication process. With each new person comes a multiplier effect on the number of possible interactions, and for many that means the need to establish limits.

Dimensions of Self

Who are you? You are more than your actions, and more than your communication, and the result may be greater than the sum of the parts, but how do you know yourself? In the first of the Note 16.1 "Introductory Exercises" for this chapter, you were asked to define yourself in five words or less. Was it a challenge? Can five words capture the essence of what you consider yourself to be? Was your twenty to fifty description easier? Or was it equally challenging? Did your description focus on your characteristics, beliefs, actions, or other factors associated with you? If you compared your results with classmates or coworkers, what did you observe? For many, these exercises can prove challenging as we try to reconcile the self-concept we perceive with what we desire others to perceive about us, as we try to see ourselves through our interactions with others, and as we come to terms with the idea that we may not be aware or know everything there is to know about ourselves.

Joseph Luft and Harry Ingram, gave considerable thought and attention to these dimensions of self, which are represented in Figure 5.1.2.1. In the first quadrant of the figure, information is known to you and others, such as your height or weight. The second quadrant represents things others observe about us that we are unaware of, like how many times we say "umm" in the space of five minutes. The third quadrant involves information that you know, but do not reveal to others. It may involve actively hiding or withholding information, or may involve social tact, such as thanking your Aunt Martha for the large purple hat she's given you that you know you will never wear. Finally, the fourth quadrant involves information that is unknown to you and your conversational partners. For example, a childhood experience that has been long forgotten or repressed may still motivate you. As another example, how will you handle an emergency after you've received first aid training? No one knows because it has not happened.

Figure 5.1.2.1: Luft and Ingram's Dimensions of Self

These dimensions of self serve to remind us that we are not fixed—that freedom to change combined with the ability to reflect, anticipate, plan, and predict allows us to improve, learn, and adapt to our surroundings. By recognizing that we are not fixed in our concept of "self," we come to terms with the responsibility and freedom inherent in our potential humanity.

In the context of business communication, the self plays a central role. How do you describe yourself? Do your career path, job responsibilities, goals, and aspirations align with what you recognize to be your talents? How you represent "self," through your résumé, in your writing, in your articulation and presentation—these all play an important role as you negotiate the relationships and climate present in any organization.

Key Takeaway

Self-concept involves multiple dimensions and is expressed in internal monologue and social comparisons.

Exercises

1. Examine your academic or professional résumé—or, if you don't have one, create one now. According to the dimensions of self described in this section, which dimensions contribute to your résumé? Discuss your results with your classmates.
2. How would you describe yourself in terms of the dimensions of self as shown in Figure 5.1.2.1? Discuss your thoughts with a classmate.
3. Can you think of a job or career that would be a good way for you to express yourself? Are you pursuing that job or career? Why or why not? Discuss your answer with a classmate.

References

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5.1.3: Interpersonal Needs

Learning Objectives

1. Understand the role of interpersonal needs in the communication process.

You may have had no problem answering the question, "What are you doing?" and simply pulled a couple of lines from yesterday's Twitter message or reviewed your BlackBerry calendar. But if you had to compose an entirely original answer, would it prove to be a challenge? Perhaps at first this might appear to be a simple task. You have to work and your job required your participation in a meeting, or you care about someone and met him or her for lunch.

Both scenarios make sense on the surface, but we have to consider the *why* with more depth. Why that meeting, and why that partner? Why not another job, or a lunch date with someone else? If we consider the question long enough, we'll come around to the conclusion that we communicate with others in order to meet basic needs, and our meetings, interactions, and relationships help us meet those needs. We may also recognize that not all our needs are met by any one person, job, experience, or context; instead, we diversify our communication interactions in order to meet our needs. At first, you may be skeptical of the idea that we communicate to meet our basic needs, but let's consider two theories on the subject and see how well they predict, describe, and anticipate our tendency to interact.

Abraham Maslow's hierarchy of needs, represented in Figure 5.1.3.1, may be familiar to you (Maslow, A., 1970). Perhaps you saw it in negotiation or international business classes and came to recognize its universal applicability. We need the resources listed in level one (i.e., air, food, and water) to survive. If we have met those basic needs, we move to level two: safety. We want to make sure we are safe and that our access to air, food, and water is secure. A job may represent this level of safety at its most basic level. Regardless of how much satisfaction you may receive from a job well done, a paycheck ultimately represents meeting basic needs for many. Still, for others, sacrifice is part of the job. Can you think of any professions that require individuals to make decisions where the safety of others comes first? "First responders" and others who work in public safety often place themselves at risk for the benefit of those they serve.

If we feel safe and secure, we are more likely to seek the companionship of others. Humans tend to form groups naturally, and if basic needs are met, love and belonging occur in level three. Perhaps you've been new at work and didn't understand the first thing about what was really going on. It's not that you weren't well trained and did not receive a solid education, but rather that the business or organization is made up of groups and communities that communicate and interact in distinct and divergent ways. You may have known how to do something, but not how it was done at your new place of work. Colleagues may have viewed you as a stranger or "newbie" and may have even declined to help you. Conflict may have been part of your experience, but if you were lucky, a mentor or coworker took the first step and helped you find your way.

As you came to know what was what and who was who, you learned how to negotiate the landscape and avoid landmines. Your self-esteem (level four) improved as you perceived a sense of belonging, but still may have lacked the courage to speak up.

Over time, you may have learned your job tasks and the strategies for succeeding in your organization. Perhaps you even came to be known as a reliable coworker, one who did go the extra mile, one who did assist the "newbies" around the office. If one of them came to you with a problem, you would know how to handle it. You are now looked up to by others and by yourself within the role, with your ability to make a difference. Maslow calls this "self-actualization" (level five), and discusses how people come to perceive a sense of control or empowerment over their context and environment. Where they look back and see that they once felt at the mercy of others, particularly when they were new, they can now influence and direct aspects of the work environment that were once unavailable.

Beyond self-actualization, Maslow recognizes our innate need to know (level six) that drives us to grow and learn, explore our environment, or engage in new experiences. We come to appreciate a sense of self that extends beyond our immediate experiences, beyond the function, and into the community and the representational. We can take in beauty for its own sake, and value aesthetics (level seven) that we previously ignored or had little time to consider.

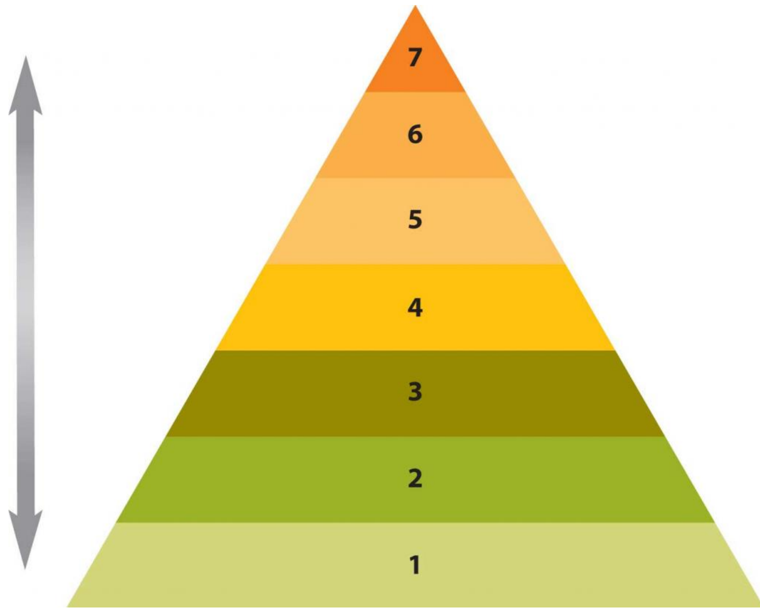

Figure 5.1.3.2: Maslow’s Hierarchy of Needs

Now that you have reached a sense of contentment in your job and can take in a museum tour, the news of a possible corporate merger is suddenly announced in the mainstream media. It may have been just gossip before, but now it is real. You may feel a sense of uncertainty and be concerned about your status as a valued employee. Do you have reason to worry about losing your job? How will you handle the responsibilities that you’ve acquired and what about the company and its obligations to those who have sacrificed over time for common success? Conflict may be more frequent in the workplace, and you may feel compelled to go over your personal budget and reprioritize your spending. You may eliminate museum visits and donations, and you may decide to start saving money as the future is less certain. You may dust off your résumé and start communicating with colleagues in related fields as you network, reaching out to regain that sense of stability, of control, that is lost as you feel your security threatened. You will move through Maslow’s hierarchy as you reevaluate what you need to survive.

This theory of interpersonal needs is individualistic, and many cultures are not centered on the individual, but it does serve to start our discussion about interpersonal needs. What do we need? Why do we communicate? The answers to both questions are often related.

William Schutz offers an alternate version of interpersonal needs. Like Maslow, he considers the universal aspects of our needs, but he outlines how they operate within a range or continuum for each person (Schutz, W., 1966). According to Schutz, the need for affection, or appreciation, is basic to all humans. We all need to be recognized and feel like we belong, but may have differing levels of expectations to meet that need. When part of the merger process is announced and the news of layoffs comes, those coworkers who have never been particularly outgoing and have largely kept to themselves may become even more withdrawn. Schutz describes underpersonals as people who seek limited interaction. On the opposite end of the spectrum, you may know people where you work that are often seeking attention and affirmation. Schutz describes overpersonals as people who have a strong need to be liked and constantly seek attention from others. The person who strikes a healthy balance is called a personal individual.

Humans also have a need for control, or the ability to influence people and events. But that need may vary by the context, environment, and sense of security. You may have already researched similar mergers, as well as the forecasts for the new organization, and come to realize that your position and your department are central to the current business model. You may have also of taken steps to prioritize your budget, assess your transferable skills, and look for opportunities beyond your current context. Schutz would describe your efforts to control your situation as autocratic, or self-directed. At the same time there may be several employees who have not taken similar steps who look to you and others for leadership, in effect abdicating their responsibility. Abdicrats shift the burn of responsibility from themselves to others, looking to others for a sense of control. Democrats share the need between the individual and the group, and may try to hold a departmental meeting to gather information and share.

Finally, Schutz echoes Maslow in his assertion that belonging is a basic interpersonal need, but notes that it exists within a range or continuum, where some need more and others less. Undersocials may be less likely to seek interaction, may prefer smaller groups, and will generally not be found on center stage. Oversocials, however, crave the spotlight of attention and are highly motivated to seek belonging. A social person is one who strikes a healthy balance between being withdrawn and being the constant center of attention.

Schutz describes these three interpersonal needs of affection, control, and belonging as interdependent and variable. In one context, an individual may have a high need for control, while in others he or she may not perceive the same level of motivation or compulsion to meet that need. Both Maslow and Schutz offer us two related versions of interpersonal needs that begin to address the central question: why communicate?

We communicate with each other to meet our needs, regardless how we define those needs. From the time you are a newborn infant crying for food or the time you are a toddler learning to say "please" when requesting a cup of milk, to the time you are a adult learning the rituals of the job interview and the conference room, you learn to communicate in order to gain a sense of self within the group or community, meeting your basic needs as you grow and learn.

Key Takeaway

Through communication, we meet universal human needs.

Exercises

1. Review the types of individuals from Schutz's theory described in this section. Which types do you think fit you? Which types fit some of your coworkers or classmates? Why? Share your opinions with your classmates and compare your self-assessment with the types they believe describe you.
2. Think of two or more different situations and how you might express your personal needs differently from one situation to the other. Have you observed similar variations in personal needs in other people from one situation to another? Discuss your thoughts with a classmate.

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5.1.4: Social Penetration Theory

Learning Objectives

1. Discuss social penetration theory and self-disclosure and its principles.
2. Describe interpersonal relations.

How do you get to know other people? If the answer springs immediately to mind, we're getting somewhere: communication. Communication allows us to share experiences, come to know ourselves and others, and form relationships, but it requires time and effort. You don't get to know someone in a day, a month, or even a year. At the same time you are coming to know them, they are changing, adapting, and growing—and so are you. Irwin Altman and Dalmas Taylor describe this progression from superficial to intimate levels of communication in social penetration theory, which is often called the Onion Theory because the model looks like an onion and involves layers that are peeled away (Altman, I. and Taylor, D., 1973). According to social penetration theory, we fear that which we do not know. That includes people. Strangers go from being unknown to known through a series of steps that we can observe through conversational interactions.

If we didn't have the weather to talk about, what would we say? People across cultures use a variety of signals to indicate neutral or submissive stances in relation to each other. A wave, a nod, or a spoken reference about a beautiful day can indicate an open, approachable stance rather than a guarded, defensive posture. At the outermost layer of the onion, in this model, there is only that which we can observe. We can observe characteristics about each other and make judgments, but they are educated guesses at best. Our nonverbal displays of affiliation, like a team jacket, a uniform, or a badge, may communicate something about us, but we only peel away a layer when we engage in conversation, oral or written.

As we move from public to private information we make the transition from small talk to substantial, and eventually intimate, conversations. Communication requires trust and that often takes time. Beginnings are fragile times and when expectations, roles, and ways of communicating are not clear, misunderstandings can occur. Some relationships may never proceed past observations on the weather, while others may explore controversial topics like politics or religion. A married couple that has spent countless years together may be able to finish each other's sentences, and as memory fades, the retelling of stories may serve to bond and reinforce the relationship. Increasingly, intimate knowledge and levels of trust are achieved over time, involving frequency of interaction as well as length and quality. Positive interactions may lead to more positive interactions, while negative ones may lead to less overall interaction.

This may appear to be common sense at first, but let's examine an example. You are new to a position and your supervisor has been in his or her role for a number of years. Some people at your same level within the organization enjoy a level of knowledge and ease of interaction with your supervisor that you lack. They may have had more time and interactions with the supervisor, but you can still use this theory to gain trust and build a healthy relationship. Recognize that you are unknown to your supervisor and vice versa. Start with superficial conversations that are neutral and nonthreatening, but demonstrate a willingness to engage in communication. Silence early in a relationship can be a sign of respect, but it can also send the message that you are fearful, shy, or lack confidence. It can be interpreted as an unwillingness to communicate, and may actually discourage interaction. If the supervisor picks up the conversation, keep your responses short and light. If not, keep an upbeat attitude and mention the weather.

Over time, the conversations may gradually grow to cross topics beyond the scope of the office, and a relationship may form that involves trust. To a degree, you and your coworkers learn to predict one another's responses and relax in the knowledge of mutual respect. If, however, you skip from superficial to intimate topics too quickly, you run risk of violating normative expectations. Trust takes time, and with that comes empathy and understanding. But if you share with your supervisor your personal struggles on day one, it may erode your credibility. According to the social penetration theory, people go from superficial to intimate conversations as trust develops through repeated, positive interactions. Self-disclosure is "information, thoughts, or feelings we tell others about ourselves that they would not otherwise know" (McLean, S., 2005). Taking it step by step, and not rushing to self-disclose or asking personal questions too soon, can help develop positive business relationships.

Principles of Self-Disclosure

Write down five terms that describe your personal self, and five terms that describe your professional self. Once you have completed your two lists, compare the results. They may have points that overlap, or may have words that describe you in your distinct roles that are quite different. This difference can be easy to address, but at times it can be a challenge to maintain. How much of “you” do you share in the workplace? Our personal and professional lives don’t exist independently, and in many ways are interdependent.

How do people know more about us? We communicate information about ourselves, whether or not we are aware of it. You cannot *not* communicate (Watzlawick, P., 1993). From your internal monologue and intrapersonal communication, to verbal and nonverbal communication, communication is constantly occurring. What do you communicate about yourself by the clothes (or brands) you wear, the tattoos you display, or the piercing you remove before you enter the workplace? Self-disclosure is a process by which you intentionally communicate information to others, but can involve unintentional, but revealing slips. Steven Beebe, Susan Beebe, and Mark Redmond offer us five principles of self-disclosure that remind us that communication is an integral part of any business or organizational setting. Let’s discuss them one by one (Beebe, S., Beebe S., and Redmond, M., 2002).

Self-Disclosure Usually Moves in Small Steps

Would you come to work on your first day wearing a large purple hat? If you knew that office attire was primarily brown and gray suits? Most people would say, “Of course not!” as there is a normative expectation for dress, sometimes called a dress code. After you have worked within the organization, earned trust and established credibility, and earned your place in the community, the purple hat might be positively received with a sense of humor. But if you haven’t yet earned your place, your fashion statement may be poorly received. In the same way, personal information is normally reserved for those of confidence, and earned over time. Take small steps as you come to know your colleagues, taking care to make sure who you are does not speak louder than what you say.

Self-Disclosure Moves from Impersonal to Intimate Information

So you decided against wearing the purple hat to work on your first day, but after a successful first week you went out with friends from your college days. You shut down the bar late in the evening and paid for it on Sunday. At work on Monday, is it a wise strategy to share the finer tips of the drinking games you played on Saturday night? Again, most people would say, “Of course not!” It has nothing to do with work, and only makes you look immature. Some people have serious substance abuse issues, and your stories could sound insensitive, producing a negative impact. How would you know, as you don’t really know your coworkers yet? In the same way, it is not a wise strategy to post photos from the weekend’s escapades on your MySpace, Facebook, or similar social networking Web page. Employers are increasingly aware of their employees’ Web pages, and the picture of you looking stupid may come to mind when your supervisor is considering you for a promotion. You represent yourself, but you also represent your company and its reputation. If you don’t represent it well, you run the risk of not representing it at all.

Self-Disclosure Is Reciprocal

Monday morning brings the opportunity to tell all sorts of stories about the weekend, and since you’ve wisely decided to leave any references to the bar in the past, you may instead choose the wise conversational strategy of asking questions. You may ask your coworkers what they did, what it was like, who they met, and where they went, but eventually all conversations form a circle that comes back to you. The dance between source and receiver isn’t linear, it’s transactional. After a couple of stories, sooner or later, you’ll hear the question, “What did you do this weekend?” It’s now your turn. This aspect of conversation is universal. We expect when we reveal something about ourselves that others will reciprocate. The dyadic effect is the formal term for this process, and is often thought to meet the need to reduce uncertainty about conversational partners. If you stay quiet or decline to answer after everyone else has taken a turn, what will happen? They may be put off at first, they may invent stories and let their imaginations run wild, or they may reject you. It may be subtle at first, but reciprocity is expected.

You have the choice of what to reveal and when. You may choose to describe your weekend by describing the friends and conversations while omitting any reference to the bar. You may choose to focus on your Sunday afternoon gardening activities. You may just say you read a good book and mention the title of the one you are reading. Regardless of what option you choose, you have the freedom and responsibility within the dyadic effect to reciprocate, but you have a degree of control. You can learn to anticipate when your turn will come, and to give some thought to what you will say before the moment arrives.

Self-Disclosure Involves Risk

If you decided to go with the “good book” option, or perhaps mention that you watched a movie, you just ran the risk that whatever you are reading or watching may be criticized. If the book you are enjoying is controversial, you might anticipate a bit of a debate, but if you mentioned a romance novel, or one that has a science fiction theme, you may have thought it wouldn’t generate criticism. Sometimes the most innocent reference or comment can produce conflict when the conversational partners have little prior history.

At the same time, nothing ventured, nothing gained. How are you going to discover that the person you work with appreciates the same author or genre if you don't share that information? Self-disclosure involves risk, but can produce positive results.

Self-Disclosure Involves Trust

Before you mention the title of the book or movie you saw this weekend, you may consider your audience and what you know about them. If you've only known them for a week, your awareness of their habits, quirks, likes and dislikes may be limited. At the same time, if you feel safe and relatively secure, you may test the waters with a reference to the genre but not the author. You may also decide that it is just a book, and they can take it or leave it.

"Trust is the ability to place confidence in or rely on the character or truth of someone" (McLean, S., 2005). Trust is a process, not a badge to be earned. It takes time to develop, and can be lost in a moment. Even if you don't agree with your coworker, understand that self-revelation communicates a measure of trust and confidence. Respect that confidence, and respect yourself.

Also, consider the nature of the information. Some information communicated in confidence must see the light of day. Sexual harassment, fraud, theft, and abuse are all issues in the workplace, and if you become aware of these behaviors you will have a responsibility to report them according to your organization's procedures. A professional understands that trust is built over time, and understands how valuable this intangible commodity can be to success.

Interpersonal Relationships

Interpersonal communication can be defined as communication between two people, but the definition fails to capture the essence of a relationship. This broad definition is useful when we compare it to intrapersonal communication, or communication with ourselves, as opposed to mass communication, or communication with a large audience, but it requires clarification. The developmental view of interpersonal communication places emphasis on the relationship rather than the size of the audience, and draws a distinction between impersonal and personal interactions.

For example, one day your coworker and best friend, Iris, whom you've come to know on a personal as well as a professional level, gets promoted to the position of manager. She didn't tell you ahead of time because it wasn't certain, and she didn't know how to bring up the possible change of roles. Your relationship with Iris will change as your roles transform. Her perspective will change, and so will yours. You may stay friends, or she may not have as much time as she once did. Over time, you and Iris gradually grow apart, spending less time together. You eventually lose touch. What is the status of your relationship?

If you have ever had even a minor interpersonal transaction such as buying a cup of coffee from a clerk, you know that some people can be personable, but does that mean you've developed a relationship within the transaction process? For many people the transaction is an impersonal experience, however pleasant. What is the difference between the brief interaction of a transaction and the interactions you periodically have with your colleague, Iris, who is now your manager?

The developmental view places an emphasis on the prior history, but also focuses on the level of familiarity and trust. Over time and with increased frequency we form bonds or relationships with people, and if time and frequency are diminished, we lose that familiarity. The relationship with the clerk may be impersonal, but so can the relationship with the manager after time has passed and the familiarity is lost. From a developmental view, interpersonal communication can exist across this range of experience and interaction.

Review the lists you made for the third of the Note 16.1 "Introductory Exercises" for this chapter. If you evaluate your list of what is important to you, will you find objects or relationships? You may value your home or vehicle, but for most people relationships with friends and family are at the top of the list. Interpersonal relationships take time and effort to form, and they can be challenging. All relationships are dynamic, meaning that they transform and adapt to changes within the context and environment. They require effort and sacrifice, and at times, give rise to the question, why bother? A short answer may be that we, as humans, are compelled to form bonds. But it still fails to answer the question, why?

Uncertainty theory states that we choose to know more about others with whom we have interactions in order to reduce or resolve the anxiety associated with the unknown (Berger, C. and Calabrese, R., 1975; Berger, C., 1986; Gudykunst, W., 1995). The more we know about others, and become accustomed to how they communicate, the better we can predict how they will interact with us in future contexts. If you learn that Monday mornings are never a good time for your supervisor, you quickly learn to schedule meetings later in the week. The predicted outcome value theory asserts that not only do we want to reduce uncertainty, we also want to maximize our possible benefit from the association (Sunnafrank, M., 1986; Sunnafrank, M., 1990; Kellerman, K and Reynolds, R., 1990). This theory would predict that you would choose Tuesday or later for a meeting in order to maximize the potential for positive interaction and any possible rewards that may result. One theory involves the avoidance of fear while the other focuses on the pursuit of reward. Together, they provide a point of reference as we continue our discussion on interpersonal relationships.

Regardless of whether we focus on collaboration or competition, we can see that interpersonal communication is necessary in the business environment. We want to know our place and role within the organization, accurately predict those within our proximity, and create a sense of safety and belonging. Family for many is the first experience in interpersonal relationships, but as we develop professionally, our relationships at work may take on many of the attributes we associate with family communication. We look to each other with similar sibling rivalries, competition for attention and resources, and support. The workplace and our peers can become as close, or closer, than our birth families, with similar challenges and rewards.

Key Takeaways

- Interpersonal relationships are an important part of the work environment.
- We come to know one another gradually.
- Self-disclosure involves risk and reward, and is a normal part of communication.

Exercises

1. Write down five terms that describe your personal self, and five terms that describe your professional self. Compare your results with a classmate.
2. Think of someone you trust and who trusts you. How did you come to have a mutually trusting relationship? Did it take effort on both people's part? Discuss your thoughts with a classmate.
3. How important do you think self-disclosure is in business settings? Give some examples. Discuss your thoughts with a classmate.

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5.1.5: Rituals of Conversation and Interviews

Learning Objectives

1. Understand the five steps in any conversation.
2. Discuss employment interviewing.

You no doubt have participated in countless conversations throughout your life, and the process of how to conduct a conversation may seem so obvious that it needs no examination. Yet, all cultures have rituals of various kinds, and conversation is one of these universal rituals. A skilled business communicator knows when to speak, when to remain silent, and to always stop speaking before the audience stops listening. Further, understanding conversation provides a solid foundation for our next discussion on employment interviewing. Employment interviews follow similar ritual patterns and have their own set of expectations. Expectations may differ based on field, level, knowledge, and experience, but they generally follow the five steps of a basic conversation.

Figure 5.1.5.1: Conversations follow rules. Search Engine People Blog – Conversation – CC BY 2.0.

Conversation as a Ritual

Why discuss the ritual of conversation? Because it is one of the main ways we interact in the business environment, and it is ripe for misunderstandings. Our everyday familiarity with conversations often makes us blind to the subtle changes that take place during the course of a conversation. Examining it will allow you to consider its components, predict the next turn, anticipate an opening or closing, and make you a better conversationalist. Steven Beebe, Susan Beebe, and Mark Redmond offer us five stages of conversation that are adapted here for our discussion (Beebe, S., Beebe, S., and Redmond, M., 2002).

Initiation

The first stage of conversation is called initiation, and requires you to be open to interact. How you communicate openness is up to you; it may involve nonverbal signals like eye contact or body positions, such as smiling or even merely facing the other person and making eye contact. A casual reference to the weather, a light conversation about the weekend, or an in-depth conversation about how the financial markets are performing this morning requires a source to start the process: someone has to initiate the exchange. For some, this may produce a degree of anxiety. If status and hierarchical relationships are present, it may be a question of who speaks when according to cultural norms. The famous anthropologist Bronislaw Malinowski called small talk “phatic communion,” (Malinowski, B., 1935) reinforcing the idea that there is a degree of ritual across cultures on how we initiate, engage, and conclude conversations.

Preview

The preview is an indication, verbal or nonverbal, of what the conversation is about, both in terms of content and in terms of the relationship. A word or two in the subject line of an e-mail may signal the topic, and the relationship between individuals, such as an employee-supervisor relationship, may be understood. A general reference to a topic may approach a topic indirectly, allowing the recipient to either pick up on the topic and to engage in the discussion or to redirect the conversation away from a topic they are not ready to talk about. People are naturally curious, and also seek certainty. A preview can serve to reduce uncertainty and signal intent.

Talking Point(s)

Joseph DeVito characterizes this step as getting down to business, reinforcing the goal orientation of the conversation (DeVito, J., 2003). In business communication, we often have a specific goal or series of points to address, but we cannot lose sight of the relationship messages within the discussion of content. You may signal to your conversation partner that there are three points to address, much like outlining an agenda at a meeting. This may sound formal at first, but if you listen to casual conversations you'll often find there is an inherent list or central point where the conversational partners arrive. By clearly articulating, either in written or oral form, the main points, you provide an outline or structure to the conversation.

Feedback

Similar to a preview step, this stage allows the conversational partners to clarify, restate, or discuss the points of the conversation to arrive a sense of mutual understanding. In some cultures the points and their feedback may recycle several times, which may sound repetitious to Western ears. In Western cultures we often get to the point rather quickly and once we've arrived at an understanding, we move quickly to the conclusion. Communication across cultures often requires additional cycles of statement and restatement to insure transmission of information as well as reinforcement of the relationship. Time may be money in some cultures, but time is also a representation of respect. Feedback is an opportunity to make sure the interaction was successful the first time. Failure to attend to this stage can lead to the need for additional interactions, reducing efficiency across time.

Closing

The acceptance of feedback on both sides of the conversation often signals the transition to the conclusion of the conversation. Closings are similar to the initiation step (Knapp, M. and Vangelisti, A., 2000), and often involve ritual norms (Malinowski, B., 1935). Verbal clues are sometimes present, but you may also notice the half step back as conversational partners create additional space in preparation to disengage.

There are times when a conversational partner introduces new information in the conclusion, which can start the process all over again. You may also note that if words like "in conclusion" or "oh—one more thing" are used, a set of expectations is now in force. A conclusion has been announced and the listener expects it. If the speaker continues to recycle at this point, the listener's listening skills are often not as keen as they were during the heat of the main engagement, and it may even produce frustration. People mentally shift to the next order of business and this transition must be negotiated successfully.

By mentioning a time, date, or place for future communication you can clearly signal that the conversation, although currently concluded, will continue later. In this way, you can often disengage successfully while demonstrating respect.

Employment Interviewing

We all join communities, teams, and groups across our lifetimes (McLean, S., 2005). We go from an unknown outsider to a new member and eventually a full member. Businesses and organizations are communities consisting of teams and groups, and if we decide to switch teams or communities, or if that decision is made for us with a reduction in force layoff, for example, we'll be back on the job market. In order to make the transition from a outsider to an insider, you'll have to pass a series of tests, both informal and formal. One of the most common tests is otherwise known as an employment interview. An employment interview is an exchange between a candidate and a prospective employer (or their representative). It is a formal process with several consistent elements that you can use to guide your preparation.

Employment interviews come in all shapes and sizes, and may not be limited to only one exchange but one interaction. A potential employee may very well be screened by a computer (as the résumé is scanned) and interviewed online or via the telephone before the applicant ever meets a representative or panel of representatives. The screening process may include formal tests that include personality tests, background investigations, and consultations with previous employers. Depending on the type of job you are seeking, you can anticipate answering questions, often more than once, to a series of people as you progress through a formal interview process. Just as you have the advantage of preparing for a speech with anticipation, you can apply the same research and public speaking skills to the employment interview.

The invitation to interview means you have been identified as a candidate who meets the minimum qualifications and demonstrate potential as a viable candidate. Your cover letter, résumé, or related application materials may demonstrate the connection between your preparation and the job duties, but now comes the moment where you will need to articulate those points out loud.

If we assume that you would like to be successful in your employment interviewing, then it makes sense to use the communication skills gained to date with the knowledge of interpersonal communication to maximize your performance. There is no one right or wrong way to prepare and present at your interview, just as each audience is unique, but we can prepare and anticipate several common elements.

Preparation

The right frame of mind is an essential element for success in communication, oral or written. For many if not most, the employment interview is surrounded with mystery and a degree of fear and trepidation. Just as giving a speech may produce a certain measure of anxiety, you can expect that a job interview will make you nervous. Anticipate this normal response, and use your nervous energy to your benefit. To place your energies where they will be put to best use, the first step is preparation.

Would you prepare yourself before writing for publication or speaking in public? Of course. The same preparation applies to the employment interview. Briefly, the employment interview is a conversational exchange (even if it is in writing at first) where the participants try to learn more about each other. Both conversational partners will have goals in terms of content, and explicitly or implicitly across the conversational exchange will be relational messages. Attending to both points will strengthen your performance.

On the content side, if you have been invited for an interview, you can rest assured that you have met the basic qualifications the employer is looking for. Hopefully, this initiation signal means that the company or organization you have thoroughly researched is one you would consider as a potential employer. Perhaps you have involved colleagues and current employees of the organization in your research process and learned about several of the organization's attractive qualities as well as some of the challenges experienced by the people working there.

Businesses hire people to solve problems, so you will want to focus on how your talents, expertise, and experience can contribute to the organization's need to solve those problems. The more detailed your analysis of their current challenges, the better. You need to be prepared for standard questions about your education and background, but also see the opening in the conversation to discuss the job duties, the challenges inherent in the job, and the ways in which you believe you can meet these challenges. Take the opportunity to demonstrate the fact that you have "done your homework" in researching the company. Table 5.1.5.1 presents a checklist of what you should try to know before you consider yourself prepared for an interview.

Table 5.1.5.1: Interview Preparation Checklist

What to Know	Examples
Type of Interview	Will it be a behavioral interview, where the employer watches what you do in a given situation? Will you be asked technical questions or given a work sample? Or will you be interviewed over lunch or coffee, where your table manners and social skills will be assessed?
Type of Dress	Office attire varies by industry, so stop by the workplace and observe what workers are wearing if you can. If this isn't possible, call and ask the human resources office what to wear—they will appreciate your wish to be prepared.
Company or Organization	Do a thorough exploration of the company's Web site. If it doesn't have one, look for business listings in the community online and in the phone directory. Contact the local chamber of commerce. At your library, you may have access to subscription sites such as Hoover's Online (www.hoovers.com).
Job	Carefully read the ad you answered that got you the interview, and memorize what it says about the job and the qualifications the employer is seeking. Use the Internet to find sample job descriptions for your target job title. Make a written list of the job tasks and annotate the list with your skills, knowledge, and other attributes that will enable you to perform the job tasks with excellence.
Employer's Needs	Check for any items in the news in the past couple of years involving the company name. If it is a small company, the local town newspaper will be your best source. In addition, look for any advertisements the company has placed, as these can give a good indication of the company's goals.

Performance

You may want to know how to prepare for an employment interview, and we're going to take it for granted that you have researched the company, market, and even individuals in your effort to learn more about the opportunity. From this solid base of preparation, you need to begin to prepare your responses. Would you like some of the test questions before the test? Luckily for you, employment interviews involve a degree of uniformity across their many representations. Here are eleven common questions you are likely to be asked in an employment interview (McLean, S., 2005):

1. Tell me about yourself.
2. Have you ever done this type of work before?
3. Why should we hire you?
4. What are your greatest strengths? Weaknesses?
5. Give me an example of a time when you worked under pressure.
6. Tell me about a time you encountered (X) type of problem at work. How did you solve the problem?
7. Why did you leave your last job?
8. How has your education and/or experience prepared you for this job?
9. Why do you want to work here?
10. What are your long-range goals? Where do you see yourself three years from now?
11. Do you have any questions?

When you are asked a question in the interview, look for its purpose as well as its literal meaning. "Tell me about yourself" may sound like an invitation for you to share your text message win in last year's competition, but it is not. The employer is looking for someone who can address their needs. Telling the interviewer about yourself is an opportunity for you make a positive professional impression. Consider what experience you can highlight that aligns well with the job duties and match your response to their needs.

In the same way, responses about your strengths are not an opening to brag, and your weakness not an invitation to confess. If your weakness is a tendency towards perfectionism, and the job you are applying for involves a detail orientation, you can highlight how your weaknesses may serve you well in the position.

Consider using the "because" response whenever you can. A "because" response involves the restatement of the question followed by a statement of how and where you gained education or experience in that area. For example, if you are asked about handling difficult customers, you could answer that you have significant experience in that area because you've served as a customer service representative with X company for X years. You may be able to articulate how you were able to turn an encounter with a frustrated customer into a long-term relationship that benefited both the customer and the organization. Your specific example, and use of a "because" response, can increase the likelihood that the interviewer or audience will recall the specific information you provide.

You may be invited to participate in a conference call, and be told to expect it will last around twenty minutes. The telephone carries your voice and your words, but doesn't carry your nonverbal gestures. If you remember to speak directly into the telephone, look up and smile, your voice will come through clearly and you will sound competent and pleasant. Whatever you do, don't take the call on a cell phone with an iffy connection—your interviewers are guaranteed to be unfavorably impressed if you keep breaking up during the call. Use the phone to your advantage by preparing responses on note cards or on your computer screen before the call. When the interviewers ask you questions, keep track of the time, limiting each response to about a minute. If you know that a twenty-minute call is scheduled for a certain time, you can anticipate that your phone may ring may be a minute or two late, as interviews are often scheduled in a series while the committee is all together at one time. Even if you only have one interview, your interviewers will have a schedule and your sensitivity to it can help improve your performance.

You can also anticipate that the last few minutes will be set aside for you to ask your questions. This is your opportunity to learn more about the problems or challenges that the position will be addressing, allowing you a final opportunity to reinforce a positive message with the audience. Keep your questions simple, your attitude positive, and communicate your interest.

At the same time as you are being interviewed, know that you too are interviewing the prospective employer. If you have done your homework you may already know what the organization is all about, but you may still be unsure whether it is the right fit for you. Listen and learn from what is said as well as what is not said, and you will add to your knowledge base for wise decision making in the future.

Above all, be honest, positive, and brief. You may have heard that the world is small and it is true. As you develop professionally, you will come to see how fields, organizations, and companies are interconnected in ways that you cannot anticipate. Your name and reputation are yours to protect and promote.

Postperformance

You completed your research of the organization, interviewed a couple of employees, learned more about the position, were on time for the interview (virtual or in person), wore neat and professional clothes, and demonstrated professionalism in your brief, informative responses. Congratulations are in order, but so is more work on your part.

Remember that feedback is part of the communication process: follow up promptly with a thank-you note or e-mail, expressing your appreciation for the interviewer's time and interest. You may also indicate that you will call or e-mail next week to see if they have any further questions for you. (Naturally, if you say you will do this, make sure you follow through!) In the event that you have decided the position is not right for you, the employer will appreciate your notifying them without delay. Do this tactfully, keeping in mind that communication occurs between individuals and organizations in ways you cannot predict.

After you have communicated with your interviewer or committee, move on. Candidates sometimes become quite fixated on one position or job and fail to keep their options open. The best person does not always get the job, and the prepared business communicator knows that networking and research is a never-ending, ongoing process. Look over the horizon at the next challenge and begin your research process again. It may be hard work, but getting a job is your job. Budget time and plan on the effort it will take to make the next contact, get the next interview, and continue to explore alternate paths to your goal.

You may receive a letter, note, or voice mail explaining that another candidate's combination of experience and education better matched the job description. If this happens, it is only natural for you to feel disappointed. It is also only natural to want to know why you were not chosen, but be aware that for legal reasons most rejection notifications do not go into detail about why one candidate was hired and another was not. Contacting the company with a request for an explanation can be counterproductive, as it may be interpreted as a "sore loser" response. If there is any possibility that they will keep your name on file for future opportunities, you want to preserve your positive relationship.

Although you feel disappointed, don't focus on the loss or all the hard work you've produced. Instead, focus your energies where they will serve you best. Review the process and learn from the experience, knowing that each audience is unique and even the most prepared candidate may not have been the right "fit." Stay positive and connect with people you who support you. Prepare, practice, and perform. Know that you as a person are far more than just a list of job duties. Focus on your skill sets: if they need improvement, consider additional education that will enhance you knowledge and skills. Seek out local resources and keep networking. Have your professional interview attire clean and ready, and focus on what you can control—your preparation and performance.

Key Takeaway

Conversations have universal aspects we can predict and improve. We can use the dynamics of the ritual of conversation to learn to prepare for employment interviews and evaluations, both common contexts of communication in the work environment. Employment interviews involve preparation, performance, and feedback.

Exercises

1. How does the employment interview serve both interviewer and interviewee? Explain and present your thoughts to the class.
2. Identify a company that you might be interested in working for. Use the resources described in this section to research information about the company, the kinds of jobs it hires people to do, and the needs and goals of the organization. Share your findings with your classmates.
3. Find a job announcement of a position that might interest you after you graduate or reach your professional goal. Write a brief statement of what experience and education you currently have that applies to the position and note what you currently lack.
4. What are the common tasks and duties of a job you find interesting? Create a survey, identify people who hold a similar position, and interview them (via e-mail or in person). Compare your results with your classmates.
5. What has been your employment interview experience to date? Write a brief statement and provide examples.
6. What employment-related resources are available on your campus or in your community? Investigate and share your findings.
7. Prepare for a job that you would like to do by finding a job announcement, preparing sample responses, and enlisting a friend or colleague in playing the role of a mock interviewer. Limit your interview to fifteen minutes and record it (audio or audio/visual) and post it in class. If your instructor indicates this exercise will be an in-class exercise or assessment, dress the part and be completely prepared. Use this exercise to prepare you for the moment when you will be required to perform and when you want the job.

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5.1.6: Conflict in the Work Environment

Learning Objectives

- Understand evaluations and criticism in the workplace, and discuss several strategies for resolving workplace conflict.

The word "conflict" produces a sense of anxiety for many people, but it is part of the human experience. Just because conflict is universal does not mean that we cannot improve how we handle disagreements, misunderstandings, and struggles to understand or make ourselves understood. Joyce Hocker and William Wilmot offer us several principles on conflict that have been adapted here for our discussion:

- Conflict is universal.
- Conflict is associated with incompatible goals.
- Conflict is associated with scarce resources.
- Conflict is associated with interference.
- Conflict is not a sign of a poor relationship.
- Conflict cannot be avoided.
- Conflict cannot always be resolved.
- Conflict is not always bad.

Conflict is the physical or psychological struggle associated with the perception of opposing or incompatible goals, desires, demands, wants, or needs (McLean, S., 2005). When incompatible goals, scarce resources, or interference are present, conflict is a typical result, but it doesn't mean the relationship is poor or failing. All relationships progress through times of conflict and collaboration. How we navigate and negotiate these challenges influences, reinforces, or destroys the relationship. Conflict is universal, but how and when it occurs is open to influence and interpretation. Rather than viewing conflict from a negative frame of reference, view it as an opportunity for clarification, growth, and even reinforcement of the relationship.

Conflict Management Strategies

As professional communicators, we can acknowledge and anticipate that conflict will be present in every context or environment where communication occurs. To that end, we can predict, anticipate, and formulate strategies to address conflict successfully. How you choose to approach conflict influences its resolution. Joseph DeVito offers us several conflict management strategies that we have adapted and expanded for our use.

Avoidance

You may choose to change the subject, leave the room, or not even enter the room in the first place, but the conflict will remain and resurface when you least expect it. Your reluctance to address the conflict directly is a normal response, and one which many cultures prize. In cultures where independence is highly valued, direct confrontation is more common. In cultures where the community is emphasized over the individual, indirect strategies may be more common. Avoidance allows for more time to resolve the problem, but can also increase costs associated with problem in the first place. Your organization or business will have policies and protocols to follow regarding conflict and redress, but it is always wise to consider the position of your conversational partner or opponent and to give them, as well as yourself, time to explore alternatives.

Defensiveness versus Supportiveness

Jack Gibb discussed defensive and supportive communication interactions as part of his analysis of conflict management. Defensive communication is characterized by control, evaluation, and judgments, while supportive communication focuses on the points and not personalities. When we feel judged or criticized, our ability to listen can be diminished, and we may only hear the negative message. By choosing to focus on the message instead of the messenger, we keep the discussion supportive and professional.

Face-Detracting and Face-Saving

Communication is not competition. Communication is the sharing of understanding and meaning, but does everyone always share equally? People struggle for control, limit access to resources and information as part of territorial displays, and otherwise use the process of communication to engage in competition. People also use communication for collaboration. Both competition and collaboration can be observed in communication interactions, but there are two concepts central to both: face-detracting and face-saving strategies.

Face-detracting strategies involve messages or statements that take away from the respect, integrity, or credibility of a person. Face-saving strategies protect credibility and separate message from messenger. For example, you might say that "sales were down this quarter," without specifically noting who was responsible. Sales were simply down. If, however, you ask, "How does the sales manager explain the decline in sales?" you have specifically connected an individual with the negative news. While we may want to specifically connect tasks and job responsibilities to individuals and departments, in terms of language each strategy has distinct results.

Face-detracting strategies often produce a defensive communication climate, inhibit listening, and allow for little room for collaboration. To save face is to raise the issue while preserving a supportive climate, allowing room in the conversation for constructive discussions and problem solving. By using a face-saving strategy to shift the emphasis from the individual to the issue, we avoid power struggles and personalities, providing each other space to save face (Donohue, W. and Klot, R., 1992).

In collectivist cultures, where the community's well-being is promoted or valued above that of the individual, face-saving strategies are a common communicative strategies. In Japan, for example, to confront someone directly is perceived as humiliation, a great insult. In the United States, greater emphasis is placed on individual performance, and responsibility may be more directly assessed. If our goal is to solve a problem, and preserve the relationship, then consideration of a face-saving strategy should be one option a skilled business communicator considers when addressing negative news or information.

Empathy

Communication involves not only the words we write or speak, but how and when we write or say them. The way we communicate also carries meaning, and empathy for the individual involves attending to this aspect of interaction. Empathetic listening involves listening to both the literal and implied meanings within a message. For example, the implied meaning might involve understanding what has led this person to feel this way. By paying attention to feelings and emotions associated with content and information, we can build relationships and address conflict more constructively. In management, negotiating conflict is a common task and empathy is one strategy to consider when attempting to resolve issues.

Gunnysacking

George Bach and Peter Wyden discuss gunnysacking (or backpacking) as the imaginary bag we all carry into which we place unresolved conflicts or grievances over time. If your organization has gone through a merger, and your business has transformed, there may have been conflicts that occurred during the transition. Holding onto the way things used to be can be like a stone in your gunnysack, and influence how you interpret your current context.

People may be aware of similar issues but might not know your history, and cannot see your backpack or its contents. For example, if your previous manager handled issues in one way, and your new manage handles them in a different way, this may cause you some degree of stress and frustration. Your new manager cannot see how the relationship existed in the past, but will still observe the tension. Bottling up your frustrations only hurts you and can cause your current relationships to suffer. By addressing, or unpacking, the stones you carry, you can better assess the current situation with the current patterns and variables.

We learn from experience, but can distinguish between old wounds and current challenges, and try to focus our energies where they will make the most positive impact.

Managing Your Emotions

Have you ever seen red, or perceived a situation through rage, anger, or frustration? Then you know that you cannot see or think clearly when you are experiencing strong emotions. There will be times in the work environment when emotions run high. Your awareness of them can help you clear your mind and choose to wait until the moment has passed to tackle the challenge.

"Never speak or make decision in anger" is one common saying that holds true, but not all emotions involve fear, anger, or frustration. A job loss can be a sort of professional death for many, and the sense of loss can be profound. The loss of a colleague to a layoff while retaining your position can bring pain as well as relief, and a sense of survivor's guilt. Emotions can be contagious in the workplace, and fear of the unknown can influence people to act in irrational ways. The wise business communicator can recognize when emotions are on edge in themselves or others, and choose to wait to communicate, problem-solve, or negotiate until after the moment has passed.

Evaluations and Criticism in the Workplace

Mary Ellen Guffey wisely notes that Xenophon, a Greek philosopher, once said, "The sweetest of all sounds is praise" (Guffey, M., 2008). We have seen previously that appreciation, respect, inclusion, and belonging are all basic human needs across all contexts, and are particularly relevant in the workplace. Efficiency and morale are positively related, and recognition of good work is important. There may come a time, however, when evaluations involve criticism. Knowing how to approach this criticism can give you peace of mind to listen clearly, separating subjective, personal attacks from objective, constructive requests for improvement. Guffey offers us seven strategies for giving and receiving evaluations and criticism in the workplace that we have adapted here.

Listen without Interrupting

If you are on the receiving end of an evaluation, start by listening without interruption. Interruptions can be internal and external, and warrant further discussion. If your supervisor starts to discuss a point and you immediately start debating the point in your mind, you are paying attention to yourself and what you think they said or are going to say, and not that which is actually communicated. This gives rise to misunderstandings and will cause you to lose valuable information you need to understand and address the issue at hand.

External interruptions may involve your attempt to get a word in edgewise, and may change the course of the conversation. Let them speak while you listen, and if you need to take notes to focus your thoughts, take clear notes of what is said, also noting points to revisit later. External interruptions can also take the form of a telephone ringing, a "text message has arrived" chime, or a coworker dropping by in the middle of the conversation.

As an effective business communicator, you know all too well to consider the context and climate of the communication interaction when approaching the delicate subject of evaluations or criticism. Choose a time and place free from interruption. Choose one outside the common space where there may be many observers. Turn off your cell phone. Choose face-to-face communication instead of an impersonal e-mail. By providing a space free of interruption, you are displaying respect for the individual and the information.

Determine the Speaker's Intent

We have discussed previews as a normal part of conversation, and in this context they play an important role. People want to know what is coming and generally dislike surprises, particularly when the context of an evaluation is present. If you are on the receiving end, you may need to ask a clarifying question if it doesn't count as an interruption. You may also need to take notes and write down questions that come to mind to address when it is your turn to speak. As a manager, be clear and positive in your opening and lead with praise. You can find one point, even if it is only that the employee consistently shows up to work on time, to highlight before transitioning to a performance issue.

Indicate You Are Listening

In mainstream U.S. culture, eye contact is a signal that you are listening and paying attention to the person speaking. Take notes, nod your head, or lean forward to display interest and listening. Regardless of whether you are the employee receiving the criticism or the supervisor delivering it, displaying listening behavior engenders a positive climate that helps mitigate the challenge of negative news or constructive criticism.

Paraphrase

Restate the main points to paraphrase what has been discussed. This verbal display allows for clarification and acknowledges receipt of the message.

If you are the employee, summarize the main points and consider steps you will take to correct the situation. If none come to mind or you are nervous and are having a hard time thinking clearly, state out loud the main point and ask if you can provide solution steps and strategies at a later date. You can request a follow-up meeting if appropriate, or indicate you will respond in writing via e-mail to provide the additional information.

If you are the employer, restate the main points to ensure that the message was received, as not everyone hears everything that is said or discussed the first time it is presented. Stress can impair listening, and paraphrasing the main points can help address this common response.

If You Agree

If an apology is well deserved, offer it. Communicate clearly what will change or indicate when you will respond with specific strategies to address the concern. As a manager you will want to formulate a plan that addresses the issue and outlines responsibilities as well as time frames for corrective action. As an employee you will want specific steps you can both agree on that will serve to solve the problem. Clear communication and acceptance of responsibility demonstrates maturity and respect.

If You Disagree

If you disagree, focus on the points or issue and not personalities. Do not bring up past issues and keep the conversation focused on the task at hand. You may want to suggest, now that you better understand their position, a follow-up meeting to give you time to reflect on the issues. You may want to consider involving a third party, investigating to learn more about the issue, or taking time to cool off.

Do not respond in anger or frustration; instead, always display professionalism. If the criticism is unwarranted, consider that the information they have may be flawed or biased, and consider ways to learn more about the case to share with them, searching for a mutually beneficial solution.

If other strategies to resolve the conflict fail, consider contacting your human resources department to learn more about due process procedures at your workplace. Display respect and never say anything that would reflect poorly on yourself or your organization. Words spoken in anger can have a lasting impact and are impossible to retrieve or take back.

Learn from Experience

Every communication interaction provides an opportunity for learning if you choose to see it. Sometimes the lessons are situational and may not apply in future contexts. Other times the lessons learned may well serve you across your professional career. Taking notes for yourself to clarify your thoughts, much like a journal, serve to document and help you see the situation more clearly.

Recognize that some aspects of communication are intentional, and may communicate meaning, even if it is hard to understand. Also, know that some aspects of communication are unintentional, and may not imply meaning or design. People make mistakes. They say things they should not have said. Emotions are revealed that are not always rational, and not always associated with the current context. A challenging morning at home can spill over into the work day and someone's bad mood may have nothing to do with you.

Try to distinguish between what you can control and what you cannot, and always choose professionalism.

Key Takeaway

Conflict is unavoidable and can be opportunity for clarification, growth, and even reinforcement of the relationship.

Exercises

1. Write a description of a situation you recall where you came into conflict with someone else. It may be something that happened years ago, or a current issue that just arose. Using the principles and strategies in this section, describe how the conflict was resolved, or could have been resolved. Discuss your ideas with your classmates.
2. Of the strategies for managing conflict described in this section, which do you think are the most effective? Why? Discuss your opinions with a classmate.
3. Can you think of a time when a conflict led to a new opportunity, better understanding, or other positive result? If not, think of a past conflict and imagine a positive outcome. Write a two- to three-paragraph description of what happened, or what you imagine could happen. Share your results with a classmate.

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5.1.7: Additional Resources

A Literary Devices article describes the literary devices of "interior monologue" and stream of consciousness. http://literarydevices.net/stream-of-consciousness/

For another twist on the meaning of "stream of consciousness," visit this blog from the retail merchant Gaiam. http://blog.gaiam.com

Read an informative article on self-concept and self-esteem by Arash Farzaneh. psychology.suite101.com/article.cfm/impact_of_selfconcept_and_selfesteem_on_life

PsyBlog offers an informative article on self-disclosure. Don't miss the readers' comments at the end! http://www.spring.org.uk/2007/02/getting-closer-art-of-self-disclosure.php

The job search site Monster.com offers a menu of articles about employment interviews. career-advice.monster.com/job-interview/careers.aspx

About.com offers an informative article about different types of job interviews. http://jobsearch.about.com/od/interviewsnetworking/a/interviewtypes.htm

The Boston Globe's Boston.com site offers tips on handling conflict in the workplace. www.boston.com/jobs/advice/2013/12/30/tips-for-handling-workplace-conflict/HdjGXL7AqfH4G1bQQ0JITM/story.html#slide-1

SECTION OVERVIEW

5.2: Finding a Job

5.2.1: The Purpose of Résumés

Learning Objectives

- Discuss the purpose and contents of a résumé

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 "Why Do I Need a Resume?" here.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=640

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

https://assessments.lumenlearning.co...sessments/8711

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5.2.2: Writing Effective Résumés

Learning Objectives

- Identify characteristics of an effective résumé

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.)

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=642

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.

A link to an interactive elements can be found at the bottom of this page.

Click here for a text-only version of the activity.

Practice Question

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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.

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5.2.3: Creating a Customized Résumé

Learning Objectives

- Create a résumé customized for a specific job opening

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.

Building Block Section	Example	Comments
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.
Work Experience	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.	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. Take not, the bullets are written with parallel construction. 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.

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

https://assessments.lumenlearning.co...sessments/8713

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5.2.4: Writing Effective Cover Letters

Learning Objectives

- Identify characteristics of an effective cover letter

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 "5 Steps to an Incredible Cover Letter."

A link to an interactive elements can be found at the bottom of this page.

Practice Question

https://assessments.lumenlearning.co...sessments/8714

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	Article on Cover Letters via LinkedIn	This article on cover letters posted on LinkedIn may lend some helpful professional insights on writing an engaging cover letter.

	WEBSITE	DESCRIPTION
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

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5.2.5: Introduction to 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 more on to more qualified applicants, so do everything you can to show that you're the person they need. 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

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5.2.6: Preparing For a Job Interview

Learning Objectives

- Describe effective strategies to prepare for an 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."

Practice Question

https://assessments.lumenlearning.co...sessments/8715

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. Perhaps the simplest trick in the interview is to quickly wonder, "Why did they ask that question?" There's a purpose behind each question asked—that person wants to know how you can do this new job. You quickly have to demonstrate that you have what it takes.

There are all kinds of memorable 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.

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5.2.7: Interview Types and Techniques

Learning Objectives

- Differentiate between types of interview situations and identify appropriate interview techniques for each

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.

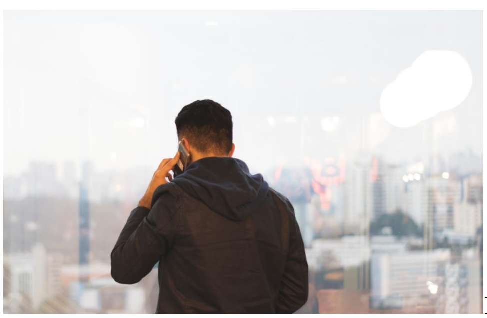
Using your LinkedIn, GlassDoor, or Zip Recruiter account and other web searches, you can sometimes learn more about the company you will be interviewing with. That may help you plan for the types of interviews listed below. Most of these prepare for a series of interviews, which is more common than a 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.

Practice Question

https://assessments.lumenlearning.co...sessments/8716

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5.2.8: Interview Questions

Learning Objectives

- Discuss various question types common in interviews

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 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

https://assessments.lumenlearning.co...sessments/8717

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.

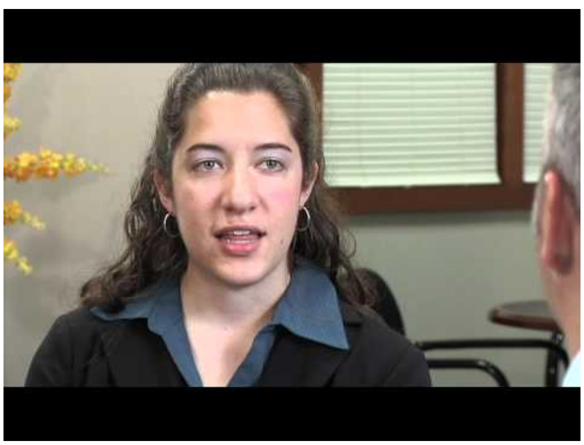
If you can use the databases below to find questions to practice with, record yourself. Then watch the recording and score each response against the STAR technique discussed earlier. From these databases, look at the broad categories of questions so that you may prepare some responses and examples for 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…")

Type	Example	Considerations
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: http://pb.libretexts.org/bcsfm/?p=654

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.

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5.2.9: 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.

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5.2.10: Assignment- Finding a Job

For this assignment, you are going to find a job advertisement online that you would potentially want to apply for someday. You'll then create a custom résumé and cover letter for this specific job, and then fill out the Interview Research Worksheet for your chosen job.

- Click here to download a PDF of the Interview Research Worksheet.
- Click here to download a .docx file of the Interview Research Worksheet.

You will submit a link to the job advertisement, your custom résumé, your cover letter, and your completed Interview Research Worksheet to your instructor.

NOTE: You can use your actual work and volunteer experience as you create your résumé and cover letter for this assignment, so you'll be able to use them as starting points when applying for jobs in the "real world." If you are still building your work work experience, complete this assignment for the job you want in the future.

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Provide a link to an applicable job posting	**0 pts** Link is not provided	**0pts** Link is not provided	**3 pts** Job is not applicable	**5pts** Link is provided and job is applicable	5 pts
Create a customized résumé, matching the vocabulary and skills of the provided job posting	**0 pts** No résumé is submitted	**5 pts** Résumé does not include all elements of a résumé	**10 pts** Résumé includes all elements of a résumé, but does not align perfectly to the job posting	**15 pts** Résumé includes all elements of a résumé, and aligns perfectly to the job posting	15 pts
Create a customized cover letter, matching the vocabulary and skills of the provided job posting	**0 pts** No cover letter is submitted	**5 pts** Letter does not include all elements of a cover letter	**10 pts** Letter includes all elements of a résumé, but does not align perfectly to the job posting	**15 pts** Letter includes all elements of a résumé, and aligns perfectly to the job posting	15 pts
Complete the Interview Research worksheet	**0 pts** No worksheet is submitted	**5 pts** Worksheet is only partially completed	**10 pts** Worksheet is completed, but does not match details of the job posting	**15 pts** Worksheet is completed and matches details from the job posting	15 pts
				Total:	**50 pts**

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5.2.11: 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.

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5.2.12: Introduction to 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.[1] 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.

1. ReviseSociology. "What Percentage of Your Life Will You Spend at Work?" *ReviseSociology.com.* 16 Aug 2016. Web. 10 July 2018. ↵

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5.2.13: Skills for a Career

Learning Objectives

- List specific skills that will be necessary for your career path

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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5.2.14: Transferable Skills

Learning Objectives

- List transferable skills that will be valuable for any career path

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

https://assessments.lumenlearning.co...sessments/8707

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 "10 Top Skills That Will Get You a Job When You Graduate." 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.

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=628

How to Find a New Job–Transferable Job Skills

The following video 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.

A link to an interactive elements can be found at the bottom of this page.

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.
- 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.

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5.2.15: Acquiring Necessary Skills

Learning Objectives

- Explain how to acquire necessary skills, both in and out of class, for your career goals

"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

https://assessments.lumenlearning.co...sessments/8708

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

A link to an interactive elements can be found at the bottom of this page.

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.

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5.2.16: Stages of Career Development

Learning Objectives

- Describe the 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.

A link to an interactive elements can be found at the bottom of this page.

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.

#	STAGE	DESCRIPTION
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.

A link to an interactive elements can be found at the bottom of this page.

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.

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- The Secret to Getting a Job After College. **Authored by**: CT STYLE. **Located at**: https://youtu.be/OpeIqQ5qTjc. **License**: *All Rights Reserved*. **License Terms**: Standard YouTube License

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5.2.17: Introduction to 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.

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5.2.18: Strategies for Networking

Learning Objectives

- 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:[1]

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 you may or may not choose to use it, 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

https://assessments.lumenlearning.co...sessments/8710

1. Blank, Hank. *Networking Tips for College Students and Young People*, https://youtu.be/TDVstonPPP8. Web. 10 July 2018. ↵

Contributors and Attributions

5.2.19: Introduction to 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.

Contributors and Attributions

SECTION OVERVIEW

5.3: Recruiting and Selecting New Employees

5.3.1: Asking Questions

Learning outcomes

- Discuss how to come up with effective questions for an interview.

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.

Figure 1. Studies of job interviews show that they are more effective at predicting future job performance when they are structured.

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.

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

https://assessments.lumenlearning.co...sessments/8725

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."[1] 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":[2]

- **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[3]. 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)."[4]

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.

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1. "Hire a Top Performer Every Time with These Interview Questions." *First Round Review*. Web. 10 July 2018. ↵
2. Ibid. ↵
3. Onley, Dawn. "These Interview Questions Could Get HR in Trouble." *SHRM*. 19 June 2017. Web. 10 July 2018. ↵
4. The Department of Fair Employment and Housing. "Employment Inquiries: What Can Employers Ask Applicants and Employees." Web. 10 July 2018. ↵

5.3.2: Phone Interviewing

Learning outcomes

- Discuss the process of effective phone interviews

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

https://assessments.lumenlearning.co...sessments/8726

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:

A YouTube element has been excluded from this version of the text. You can view it online here: http://pb.libretexts.org/bcsfm/?p=682

5.3.3: Face-to-Face Interviewing

Learning outcomes

- Discuss the process of effective face-to-face interviews

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:

- **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

https://assessments.lumenlearning.co...sessments/8727

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:

//plugin.3playmedia.com/show?ad_autoplay=1&ad_default_source_volume_control=1&ad_source_volume_control=0&itx_collapse_on_load=0&itx_collapsible=1&itx_downloadable=0&itx_highlight_by_caption_frames=0&itx_keywords=1&itx_light_scroll=0&itx_multi_text_track=0&itx_p

rogress_bar=1&itx_progressive_tracking=1&mf=2775031&p=20361&pt=5&video_id=DHDrj0_bMQ0&video_target=tpm-plugin-wls6iq69-DHDrj0_bMQ0

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).

5.3.4: Introduction to 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[1]." In this section, we'll discuss common perception errors and decision mindset tips and review job offer formats and considerations.

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1. https://www.businessnewsdaily.com/5827-employer-hiring-mistakes.html ↵

5.3.5: Selection

Learning outcomes

- Discuss methods of selecting the best candidate.

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[1]. 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

https://assessments.lumenlearning.co...sessments/8728

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."[2] 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.

1. https://blogs.scientificamerican.com/unofficial-prognosis/study-shows-gender-bias-in-science-is-real-heres-why-it-matters/ ↵
2. https://www.deputy.com/blog/77-retail-interview-questions-to-hire-the-right-candidate#suitability ↵

5.3.6: The Job Offer

Learning outcomes

- Describe how to complete a 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[1] 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

https://assessments.lumenlearning.co...sessments/8729

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1. https://www.shrm.org/resourcesandtools/hr-topics/talent-acquisition/pages/offer-letters-effective-employment-agreements.aspx ↵

5.3.7: 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?[1]

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/

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1. http://wunderlin.com/get-the-right-people-on-the-bus-2/#.WwnQqlMvwb2 ↵

5.3.8: Assignment- Recruiting and Selecting New Employees

You are a store manager at a natural beauty supply store, NatureU, a small chain that has three locations within 25 miles of one another. One of your day-shift managers, Rochelle, has just let you know she was accepted into medical school and will be moving in July.

Part 1: The Job Advertisement

Your task is to write an appealing job advertisement. As such a small company, NatureU does not have any standard language for job advertisements, but they did provide the following list of company values:

- We're dedicated to providing our customers with products they know are cruelty-free and eco-friendly.
- We're dedicated to helping our customers find the products that best suit their needs and help them display their natural beauty.
- We're dedicated to helping our employees grow and achieve their life and career goals.
- We're dedicated to enriching our local community by working with local providers and providing unique products.

Given these, write a job advertisement for a part-time day-shift manager position.

Part 2: The Interview

Your advertisement has brought in several candidates, and you've narrowed down the pool to a final three candidates to interview one on one. You want to ensure you evaluate the candidate fairly, so you've decided to have structured interviews, asking from a pre-established list of questions. Your task is to write a list of questions to be asked in each interview.

Submit your job description and your list of interview questions to your instructor as an email attachment.

Grading Rubric

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Organization and format	**2 pts** Writing lacks logical organization. It may show some coherence but ideas lack unity. Serious errors and generally is an unorganized format and information.	**3 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Some points may be contextually misplaced and/or stray from the topic. Transitions may be evident but not used throughout the essay. Organization and format used may detract from understanding the material presented.	**4 pts** Writing is coherent and logically organized, using a format suitable for the material presented. Transitions between ideas and paragraphs create coherence. Overall unity of ideas is supported by the format and organization of the material presented.	**5 pts** Writing shows high degree of attention to details and presentation of points. Format used enhances understanding of material presented. Unity clearly leads the reader to the writer's conclusion and the format and information could be used independently.	**5 pts**

Criteria	Not Evident	Developing	Proficient	Exemplary	Points
Content	**2 pts** Some but not all required questions are addressed. Content and/or terminology is not properly used or referenced. Little or no original thought is present in the writing. Concepts presented are merely restated from the source, or ideas presented do not follow the logic and reasoning presented throughout the writing.	**3 pts** All required questions are addressed but may not be addressed with thoughtful consideration and/or may not reflect proper use of content terminology or additional original thought. Additional concepts may not be present and/or may not be properly cited sources.	**4 pts** All required questions are addressed with thoughtful consideration reflecting both proper use of content terminology and additional original thought. Some additional concepts may be presented from other properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts** All required questions are addressed with thoughtful in-depth consideration reflecting both proper use of content terminology and additional original thought. Additional concepts are clearly presented from properly cited sources, or originated by the author following logic and reasoning they've clearly presented throughout the writing.	**5 pts**
Development – Critical Thinking	**4 pts** Shows some thinking and reasoning but most ideas are underdeveloped, unoriginal, and/or do not address the questions asked. Conclusions drawn may be unsupported, illogical or merely the author's opinion with no supporting evidence presented.	**6 pts** Content indicates thinking and reasoning applied with original thought on a few ideas, but may repeat information provided and/ or does not address all of the questions asked. The author presents no original ideas, or ideas do not follow clear logic and reasoning. The evidence presented may not support conclusions drawn.	**8 pts** Content indicates original thinking, cohesive conclusions, and developed ideas with sufficient and firm evidence. Clearly addresses all of the questions or requirements asked. The evidence presented supports conclusions drawn.	**10 pts** Content indicates synthesis of ideas, in-depth analysis and evidence beyond the questions or requirements asked. Original thought supports the topic, and is clearly a well-constructed response to the questions asked. The evidence presented makes a compelling case for any conclusions drawn.	**10 pts**
Grammar, Mechanics, Style	**2 pts** Writing contains many spelling, punctuation, and grammatical errors, making it difficult for the reader to follow ideas clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices disrupts the content. Additional information may be presented but in an unsuitable style, detracting from its understanding.	**3 pts** Some spelling, punctuation, and grammatical errors are present, interrupting the reader from following the ideas presented clearly. There may be sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices may detract from the content. Additional information may be presented, but in a style of writing that does not support understanding of the content.	**4 pts** Writing is free of most spelling, punctuation, and grammatical errors, allowing the reader to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented in a cohesive style that supports understanding of the content.	**5 pts** Writing is free of all spelling, punctuation, and grammatical errors and written in a style that enhances the reader's ability to follow ideas clearly. There are no sentence fragments and run-ons. The style of writing, tone, and use of rhetorical devices enhance the content. Additional information is presented to encourage and enhance understanding of the content.	**5 pts**
				Total:	**25 pts**

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5.3.9: Assignment- Additional Assignments for Job Candidates

Learning Outcomes

- Discuss the usefulness of creating additional assignments for potential candidates to complete

In Module 15: Recruiting and Selecting New Employees, we cover additional methods to determine a job applicant's skills. Have you ever had to complete a test or demonstrate your skills as part of the hiring process? Have you been a manager who required one of these skill assessments of your job applicants?

Using your cell phone or any other recording device, create a short video advising a fellow student who shares your time management style. You don't have to edit or create a professional-grade film. You've most likely have done this type of recording already on social media, so feel free to use the same informal conversational tone.

Do an internet search for a job posting website, such as Indeed, and read about their skills tests. Think of your audience as fellow students who are interested to learn about these skills assessments as fellow managers. In your video, you can address the following:

- How would these tests help you determine a candidate's knowledge, skills, and abilities?
- How might these tests inhibit your ability as a manager to find the best candidate?
- If you have had experience with these tests, and you feel comfortable sharing your experience, tell your audience what worked or didn't work for you.

A Note To Teachers: For this assignment, the first term students will be creating the videos, and then the next term's students can respond to the videos. After you have two terms of examples, use the best three from the batch as examples and start the process over again. Using the videos as starting points for OL discussion boards may work as well.

5.3.10: Why It Matters- Recruiting and Selecting New Employees

Why does recruiting matter?

Recruiting and selecting new employees can make or break a company. An employee represents, in the financial sense, a very high risk investment. A company's personnel costs may be 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[1]. 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[2].

No wonder a famous saying in business reminds us that people are a company's greatest asset.Choose well, and your employees can be a source of competitive advantage. On the other hand, 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[3]. 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 phase through the selection phase—and how to avoid related legal liabilities.

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1. Deeb, Carol. "Percent of a Business Budget for Salary." *Chron*. Web. 26 June 2018. ↵
2. Ferguson, Grace. "What Percentage of the Budget Should Be Spent on Payroll?" *Chron*. Web. 26 June 2018. ↵
3. Cardenas, Rebekah. "What's the Real Cost of a Bad Hire?" *HR Exchange*, 02 Apr 2014. Web. 26 June 2018. ↵

5.3.11: Introduction to 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.

5.3.12: Writing a Job Advertisement

Learning OUTCOMES

- Create a compelling 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 in the first place. 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[1], 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

https://assessments.lumenlearning.co...sessments/8718

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."[2] 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."[3]

The following nine-step job ad development process is a combination of Honeysett's recommendations and Betterteam's job posting template[4]:

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/...ployment-brand

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1. https://www.woodpersonnel.com/2012/10/30/recruiting-in-nashville-what-does-your-companys-employment-brand-really-convey-to-job-candidates/ ↵
2. https://www.themuse.com/advice/the-1-tip-for-writing-a-compelling-makespeoplewanttoshareit-blog-post ↵
3. Ibid. ↵
4. https://www.betterteam.com/job-posting-template ↵

5.3.13: Finding Potential Employees

Learning OUTCOMES

- Identify methods for finding qualified 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."[1] 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

https://assessments.lumenlearning.co...sessments/8719

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 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 "Headhunters" 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.

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1. https://resources.careerbuilder.com/employer-blog/5-best-practices-defining-employment-brand ↵

5.3.14: Bias and Protections in Hiring

Learning outcomes

- Describe the laws designed to prevent bias and discrimination in hiring.

Equal opportunity is one of our nation's core values and should be a core company policy. 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, 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

https://assessments.lumenlearning.co...sessments/8720

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[1] 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

https://assessments.lumenlearning.co...sessments/8721

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 the 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

1. https://www.eeoc.gov/eeoc/newsroom/wysk/enforcement_protections_lgbt_workers.cfm ↩

5.3.15: Screening Applicants

Learning outcomes

- Describe techniques to help screen a potential employee.

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 five 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

https://assessments.lumenlearning.co...sessments/8722

5.3.16: Portfolios, Practice Projects, Etc.

Learning outcomes

- Discuss the usefulness of creating additional assignments for potential candidates to complete.

Regardless of an interviewer's (or interview panel's) experience, judgement, or relevant expertise, an interview is largely a matter of faith. That is, the interviewers have to 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 are the best way to assess a potential employee's skills? Read the following case study to consider the role of tests in the hiring process.

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, or his ability to problem-solve.

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 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 scores make sense in a hiring decision? 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[1])." 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[2]. An example of a Cognitive ability test is a general aptitude test (GAT). A limitation of this approach, 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[3]. 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[4]."

One caveat to keep in mind in the hiring process. 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

https://assessments.lumenlearning.co...sessments/8723

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1. https://www.opm.gov/policy-data-oversight/assessment-and-selection/other-assessment-methods/work-samples-and-simulations/ ↵
2. http://blog.mcquaig.com/cognitive-ability-tests ↵
3. https://www.ncbi.nlm.nih.gov/pubmed/24188390 ↵
4. https://www.opm.gov/policy-data-oversight/assessment-and-selection/other-assessment-methods/personality-tests/ ↵

5.3.17: Introduction to Interviewing

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.

5.3.18: Who's in an Interview

Learning Outcomes

- Identify who should be present at 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

https://assessments.lumenlearning.co...sessments/8724

5.4: Gap

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Glossary

Sample Word 1 | Sample Definition 1

Glossary

Sample Word 1 | Sample Definition 1

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      - 1.4.6: Assignment- Communicating in Business - *Undeclared*
      - 1.4.7: Assignment- Seven Pillars of Communication - *Undeclared*
      - 1.4.8: Why It Matters- Communicating in Business - *Undeclared*
      - 1.4.9: Introduction to Effective Communication in Business - *Undeclared*
      - 1.4.10: Becoming a Better Employee - *Undeclared*
      - 1.4.11: The Business Audience - *Undeclared*
      - 1.4.12: Writing in Business - *Undeclared*
      - 1.4.13: Introduction to Methods of Communication - *Undeclared*
      - 1.4.14: Listening - *Undeclared*
      - 1.4.15: Verbal and Nonverbal Communication - *Undeclared*
      - 1.4.16: Introduction to Ethics in Business Communication - *Undeclared*
    - 1.5: Collaborating in Teams - *Undeclared*