Business Communication: Five Core Competencies

BUSINESS COMMUNICATION: FIVE CORE COMPETENCIES

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CHAPTER 1: BECOMING COMPETENT

Learning Objectives

By the end of the chapter, you will be able to:

- Explain why communication skills are important for career and business success
- Identify three meanings contained within every business communication message and set a goal for each
- Explain what it means to be receiver-centric
- Complete a receiver analysis
- Identify and define the five core competencies of business communication

BECOMING A COMPETENT BUSINESS COMMUNICATOR

Business Communication is Goals-Oriented and Receiver-Centric

One thing is certain: If you want to succeed in business, you need to be a competent communicator. Whether your role is in sales, accounting, marketing, information technology, human resources, or any other career specialty, you are going to spend a sizable portion of every day communicating.

You will read and respond to thousands of email messages every year.[1] You will document procedures and explain how to do things to new coworkers. You will update supervisors and staff with status reports. You will calm upset customers and try to win back their trust. You will coordinate and participate in online team meetings. You will pitch proposals to prospective clients or investors. You will try to convince your boss to support your business recommendations, give you a raise, or simply let you have next Friday off.

Because so much of the work of business *is* communication—written, spoken, and nonverbal—the effect of your ability to communicate on your career success cannot be overstated. People who are strong communicators land better jobs. They are more effective in their roles. They get promoted more quickly. And they are more likely to become organizational leaders.

1. Research firm Radicati Group reported that business professionals receive and/or respond to 120 emails per day. That's 30,000 emails per year. Source: Sara Radicati, *Email Statistics Report, 2014-2018* (Palo Alto, CA: The Radicati Group, Inc., 2014) http://www.radicati.com/wp/wp-content/uploads/2014/01/Email-Statistics-Report-2014-2018-Executive-Summary.pdf.

Recently, a learning consulting company conducted an analysis of more than 21 million job ads. The research team found that the most sought after skill in prospective employees was communication, regardless of the specific position to be filled.[2] A talent acquisition firm conducted a survey and reported that two-thirds of recruiters believe that communication skills are more important than college major for entry-level jobs.[3] Year after year, the National Association of Colleges and Employers job outlook survey shows employers rate communication skills among the most important skills a job candidate can have.[4]

Of course, you may be thinking that you have already learned a lot about how to communicate. In fact, you may have written research papers in college classes, kept a private journal, created content for your social media accounts or posted responses to others' content, sent thousands of text messages, or talked in front of groups in a social club or classroom. Indeed, those are all important communication skills. But they are not necessarily *business* communication skills.

In this book, you will gain important knowledge and insights that will help you become a competent business communicator. Certainly, you are not starting from scratch. Many of the things you have learned along the way about what it means to be a good communicator in your personal or academic life will carry over into the business world. But business is a unique context, with its own set of expectations for communication. That means that there will be things about business communication that may be brand new to you. It is also likely that a few of the skills you previously acquired may not translate to good business writing.

The good news is that you can become competent in business communication by developing specific ways to practice communicating.

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2. Mark C. Perna, "The Top 5 Power Skills Employers are Looking For in 2023," *Forbes,* May 30, 2023, https://www.forbes.com/sites/markcperna/2023/05/30/the-top-5-power-skills-employers-are-looking-for-in-2023.
3. iCIMS, *Class of 2023 Report* (Holmdel, NJ: iCIMS, 2023), https://www.icims.com/wp-content/uploads/2022/08/ClassOfReport_2023.pdf.
4. NACE, *The Job Market for the Class of 2023: Key Skills/Competencies Employers are Seeking* (Bethlehem, PA: National Association of College and Employers, 2023) https://www.naceweb.org/about-us/press/the-job-market-for-the-class-of-2023-key-skills-competencies-employers-are-seeking-and-the-impact-of-career-center-use.

Certainly, there are some guidelines and best practices you can follow (and many of these will be covered throughout this book). But more importantly, being a competent business communicator calls for fundamentally different ways to think about why you are communicating and how you are communicating. And it all starts with two foundational principles: business communication is goals-oriented and business communication is receiver-centric.

BUSINESS COMMUNICATION IS GOALS-ORIENTED

The first principle of business communication is that it is goals-oriented. Notice the "s" on the end of goals. That's right—there is more than one goal. There are three goals, each relating to one of three meanings embedded in every message you send or receive: an instrumental meaning, a relational meaning, and an identity meaning.

All Messages Carry Three Meanings

First, the **instrumental** meaning is the message that says what you want to accomplish by communicating. This part of the message is usually explicitly and directly addressed. It can be something as simple as informing your team of a room change for a meeting to something as complex as persuading top management of the cost-effectiveness of adopting sustainable business practices.

Understanding the instrumental meaning you intend to convey helps you create an instrumental goal, which is clear statement of what you intend to accomplish. The clearer and more specific you are with your instrumental goal, the better. Your focus not only should be on what you want to say, but what you want the outcome to be, or how you want your receiver to respond to your message. For example, a general goal might be "to persuade an investor that my business idea is a good one." A specific goal will be more explicit about the action or outcome you want as a result of your message. For example, it might be "to get a one-on-one meeting with an investor" or "to get an investor to invest $50,000 in my start-up venture."

Second, the **relational** meaning is the message that says something about your relationship with your receiver. Unlike an instrumental meaning that you explicitly say or write, the relational meaning often is embedded in subtler ways. It can be inferred from the tone of your message or the way you address your receiver. The point here is that even if you don't intend to say something about your relationship with your receiver, you always are saying something. For instance, a message that says, “Jenni, Thanks for your reply” conveys a friendly, peer-like relationship; whereas one to the same person that says, “Ms. Thompsen, Thank you for your reply” conveys a more formal relationship.

In terms of your relational goal setting, the biggest thing to consider is whether you want the relationship to stay as it is or to change. If an existing relationship with your receiver is positive and you want to continue that positive relationship, then you must appropriately acknowledge the existing relational dynamics in your business messages. But if you want to transform the relationship in some way—or if something about the relationship changes—then you will need to be strategic about what you intend to change and how to go about changing it. For instance, if you are a new leader in an organization, you might want to let your employees know what kind of relationship you want to have with them, whether it’s formal or friendly or somewhere in between.

Third, the **identity** meaning is the part of the message that says something about you as a communicator and as a business professional and possibly even something about your company. Again, this may not be addressed explicitly in the message. But it doesn’t mean it’s not there. Have you ever read a message or listened to someone and thought, “That person has no idea what they’re talking about” or “Wow, this person is so thoughtful”? Those are identity meanings.

The only real hard and fast goal for identity meanings is that you should always strive to be *professional*. There is never a time in business when being unprofessional is an acceptable goal. But beyond that, there is no right or wrong identity meanings to aspire toward. Those goals are all up to your judgment. At times, you may want to be seen as tough, smart, compromising, understanding, “The Boss,” funny, compassionate, principled, trustworthy, hardworking, confident, sincerely apologetic, no-nonsense, kind, or a force to be reckoned with. The point here is that you need to identify your own identity goals to fit the situation. One way of thinking about setting your identity goal is to generate of list of adjectives that you want your receiver to use to describe you.

Competent Communicators Set a Goal for Each Meaning

Competent business communicators strategically set a goal for each of these three meanings. They are specific about what they want to accomplish, the kind of relationship they have or want to have with their receiver, and how they present themselves to the receiver.

Take for instance the example of a new project manager, Drew. Drew recently was given his first project to manage, and now he needs to provide a status update to his boss. He might set his goals this way:

> ***Instrumental Goal:*** Inform my boss about the status of the project, including information about the timeline and budget.
>
> ***Relational Goal:*** I'm a new project manager. Our relationship is generally positive, but the boss doesn't really know me or my abilities very well. So I need to build a stronger, more trusting relationship.
>
> ***Identity Goal:*** I want to be seen as professional, competent, trustworthy, and a good project manager.

Once you have set your goals, then you can strategize how to meet these goals. In simple messages, these goals might be easy to achieve. But in more complicated situations, they get harder to attain simultaneously because as one part of the message changes, it changes the other meanings. That means this step is not necessarily an easy one.

Going back to the example, if Drew's project is going well, his message is simple. All he needs to do is provide an update that the project is on time and within budget. He will easily meet his instrumental, relational, and identity goals. But if the project is hitting some roadblocks, Drew's message and his ability to achieve all three of his goals become more complex.

If Drew says he is behind on the project, it is going be more difficult for him to come across as competent and an effective project manager. If he leaves out key details about the status of the project and the boss later finds out Drew was withholding negative information, then it will raise concerns about his trustworthiness and challenge the quality of their relationship. And if he simply avoids sending the status update message altogether, then he will face problems in not meeting his instrumental goal of keeping his boss informed. Furthermore, he may damage his identity by behaving in a way that may be viewed as unprofessional.

Your Turn: **Setting Goals**

Assume that you began a summer internship two weeks ago. Things are going well and you really hope to be able to get a full-time position at the company when you graduate in less than a year.

On Monday, you will have your first big assignment. You will be assisting your boss with a client meeting. Your job is to get the meeting room properly set. That means getting coffee and bagels in the morning, setting out all the information packages and copies, and setting up the technology in the room. You've already done some of the legwork. But you have to get to work an hour ahead of everyone else to make sure everything is ready.

Unfortunately, it is Sunday evening and you are suddenly very ill—possibly with a case of food poisoning. It is looking doubtful that you'll be able to make it to work in the morning.

As you don't have your boss's phone number, the only way you can reach her is by email. Identify your goals for this message.

Instrumental Goal
What outcome do you want to achieve?

Relational Goal

What kind of relationship do you have or want to have with your receiver?

Identity Goal

What are 3-5 adjectives that you would want your receiver to use to describe you?

BUSINESS COMMUNICATION IS RECEIVER-CENTRIC

The second principle of business communication is that all business communication is receiver-centric. In other words, all messages are geared not to what *you* want to say as you write or speak, but to what your *receiver* needs to read or hear. Because the receiver is the ultimate arbiter of meaning, your receiver decides whether your instrumental, relational, and identity goals are met or not.

When it comes to communicating, you should remember that *"It's not what the sender intends to send, but what the receiver perceives is received."* That can be a mouthful. So let's break it down. First, there is the message that the sender intends to send. The sender (that's you!), with your goals in mind, will put a message into words. Then the receiver will get that message by reading or listening or watching and will attempt to decipher what you meant. What the sender *thinks* you said is the message that is received.

You may have seen some definitions of communication describe this process as "encoding" and "decoding" messages.[1] Obviously, communicators want their messages to be understood exactly as they intended. Put another way, they want the encoding and decoding to work flawlessly. But you probably already know that it isn't always the case.

Sometimes business communicators intend to send one kind of message, but the receiver understands the message in a totally different way. If you think a message is clearly explained but your receivers are having trouble understanding your explanation, then your message is not clear. If you did not mean to cause any offense, but your receivers are insulted by the way

1. Encoding and decoding were central concepts in Claude Shannon and Warren Weaver's sender-receiver model of communication. Claude E. Shannon and Warren Weaver, *The Mathematical Theory of Communication* (Urbana, IL: University of Illinois Press, 1949). You can read a brief summary here.

you addressed them, then your message is still offensive. And if you wanted to come across as confident, but your receivers thought you were arrogant, then you did not meet your identity goal.

Of course, receivers are responsible for trying to understand the message being sent. And there may be opportunities for you to engage in a dialogue to correct any miscommunication. However, competent business communicators will do as much work up front to minimize miscommunication and ensure that their receivers understand the message as intended.

Receivers are Different from Audiences

Perhaps you are familiar with the term "audience" from public speaking classes. The terms audience and receiver are similar, but differ in important ways. An audience is a group of people who witness a communicative message. They may even participate in a message exchange with you. But a **receiver** is a specific person or group of people who *can act upon* the message you send.

Think about the image of audience that comes to your mind. Maybe you've played in an orchestra or acted on stage. If you have, you know that when you are on stage, the hot lights shine on you. You may know the audience is out there. You might even be able to see shadowy faces in the first couple of rows. But the farther back the audience goes, the fewer details, if any, you can see. You might also know if the audience is large or small, or if the audience is enjoying your performance based on the amount of laughter or applause you hear in response.

In public speaking situations, you also have an audience. Whether you're speaking at your local Toastmasters club, delivering a speech in a college classroom, or posting a video blog to social media, there is an audience of people paying attention to what you have to say—or at least pretending to pay attention.

In your studies, you may have learned about audience analysis. For instance, you may have described demographics of the audience. How many women and men are there? What is the average age? You may have also considered the psychographics of the audience. What percentage of the audience is registered to vote in different political parties? Is the audience mostly favorable or mostly unfavorable to your position? The point here is that you likely described your audience in collective terms.

What makes a receiver (whether an individual or a group) different from an audience is that a receiver can act upon your message. Acting upon a message is more involved than getting the audience to laugh or gasp or applaud your performance. In business, it is about getting someone to participate in a meeting, complete a task, make a decision, do repeat business with your company, or invest in your startup.

By analyzing receivers instead of audiences, the focus of your attention shifts. That means the kind of analysis you need to do is not so much about demographics or psychographics of the group but instead on the interdependent relationship you have with the receiver. In the next section, you will learn about some of the ways you can analyze your receiver.

Competent Communicators Analyze their Receiver in Multiple Ways

A receiver analysis focuses on different things than an audience analysis. The two primary components of analysis are content needs and relational dynamics.

Remember that when you are communicating strategically, your purpose is to achieve your goals. That means you need to figure out what your receiver needs to know in order to act upon your message. The "what" refers to your *content needs.*

Content Components

Often, your receiver's content needs are relatively easy to analyze. All you need to do is identify the Who, What, Where, When, Why, and How of your message. But even when you do this, you need to think about your receivers and anticipate their *specific* informational needs. Here are two broad categories to consider:

> **Information Needs**
> One of the first things to consider in your receiver analysis is what

information your receiver needs or wants. For instance, if you are inviting someone from another company to a meeting at your company, it may not be enough to simply state in what room you are meeting. For someone who has not visited your company before, you might have to provide an address, information on where to park, and information on how to get a visitor badge to enter your secured building.

You may also need to identify “what’s in it for them” and adapt accordingly. For instance, when presenting a new company initiative, you will likely have to include different information for the information technology team, the social media team, and the human resources team, as those receivers all have different needs. Whereas everyone likely needs some of the same basic information, the IT team likely wants to know how the system will interface with other computer programs, the social media team may need to know what kind of impact the program can have and how they can best promote it, and the HR team may need to have more detail about the impact the program will have on hiring.

Level of Complexity

Another key component of determining content is to gauge the appropriate level of complexity (or simplicity). The level of complexity does not mean “dumbing down” your message. In fact, it is a good idea to assume that all your receivers are intelligent. But depending upon their needs, they may have different expectations for complexity and detail. If you are a business analyst and are presenting findings from a recent data dive, a receiver who also is a business analyst might be centrally concerned with your analytic procedures and will want more detail on your statistical tests. But a high-ranking executive likely will be more concerned with the bottom line and prefer much more simplified coverage of how you analyzed the data.

Relational Components

Once you have established your receiver’s content needs, you also will need to understand your ***relational dynamics***. Relational dynamics are the elements that characterize your relationship with the receiver. In many ways, they are connected with the relational meaning and relational goals of your message.

The reason why understanding relational dynamics is important is because it helps you meet *all* of your communication goals, not just your relational goals. And getting relational dynamics wrong can have devastating consequences. Take for instance, Joe, a job seeker who writes to a high-ranking company manager to inquire about a posted vacancy for an entry-level job. If Joe addresses the manager too informally and without regard to the manager's relative power (the power to hire and the projected hierarchal power between a manager and entry-level employee), the manager may be slightly irritated, if not downright offended, by Joe's attitude. Not only will Joe be unable to meet his relational goal of establishing a positive relationship, he also may fail to meet his identity goals of being viewed as professional, confident, and a good team player. Should that happen, you can bet he won't be getting a call back for an interview.

Relational dynamics include the following elements:

Power Relationship
One of the first elements to consider in a receiver analysis is the power relationship between you and your receiver. You may have more, equal, or less power than your receiver. Sometimes that power can be hierarchical, such as when power is embedded into an organizational structure, like when bosses have more power than employees. Power can also be based on other kinds of dependencies, such as when companies are dependent upon customers' purchasing power. There might also be the power to hire/fire, the power of social influence, the power of reputation, and more.

Typically, the rules for interaction change depending upon the power relationship. We'll cover more in Chapter Two, but upward communication (to someone with more power) usually requires greater tact than downward communication (to someone with less power). For example, it may be perfectly acceptable for a boss to tell an employee, "Get me that report by 5 p.m." But the same would not be true in reverse. Instead, someone with equal or less power than the receiver might need to make the request more politely: "If you could let me know if my vacation request has been approved, I'd appreciate it."

Familiarity
Receivers also can be characterized by the degree of familiarity you have with them. The better you know someone, the more familiar your relationship is. If you have ever worked in a customer service

industry, you know that some customers are unfamiliar, like the person who comes to your shop for a walk-in appointment or a one-time transaction, and others are "regulars" whom you get to know quite well. While you may be friendly with all customers, there are different expectations for those who are more familiar to you.

As a general rule, when you are relatively unfamiliar with a receiver, you may have to resort to general principles of business etiquette for guiding communication. But as you get more familiar, you will learn more of your receivers' personal preferences or idiosyncrasies and will be able to incorporate those into your messages. You will learn if they have preferred methods of communicating, a certain sense of humor, or other preferences that will help you in your communication with them.

It is important to note that while familiarity overlaps with relationship quality, they are not the same thing. For example, you may have a very positive or very negative relationship with someone with whom you are familiar. You may have a coworker with whom you are very familiar—but only because that person is the office bully and regularly targets you with his destructive behaviors. It's even possible to develop goodwill with someone you only have met once.

Formality

Formality is the degree to which a relationship generally follows "prim and proper" rules of exchange. In this sense, you may have a relationship that is quite strict or structured, one that is relaxed, or one that is somewhere in between. Often formality has an inverse relationship to familiarity in business. That means as familiarity increases, formality decreases and vice versa.

Think about applying for a job. As you make initial contact about a job inquiry with those you do not know (completely unfamiliar), you likely addressed them formally (e.g., as "Mr. Carter" or "Dr. Jamesson"). But when you got hired and started getting to know the individuals by working with them daily, you might have started calling them by their first names, but still communicated somewhat formally. Then, after you worked with them for a longer time, you may have gotten very familiar and very informal, maybe even addressing them casually, "Hey" instead of "Hello," popping in to ask questions without setting up a meeting, or even sharing jokes or personal stories.

But just because a relationship is familiar does not mean it is always informal. There will be some relationships that will remain formal despite significant familiarity. For instance, you may have a key client in a financial services firm that you still address formally. If you work in fundraising you may still formally address major donors, even though you regularly socialize with them at networking and philanthropic events. Additionally, some relationships may be formal in some contexts but informal in other contexts. For example, you may extend a casual invitation to your boss for a get-together after work, but you would need to write a formal message if you were addressing the year-end financial reports.

To be clear, attending to relational dynamics is not just about communicating formally. In some situations, communicating formally can have detrimental effects. Case in point: Camille is a CPA who runs a small family-owned tax business. She just got an angry phone call from a close friend (and client) who just received notice that he is being audited by the IRS. If Camille responds in a way that sounds formal and unfamiliar, addressing her friend as “Mr. Jacobsen” when calling him back, she is going to communicate an identity of being uncaring and cold, and she may very well lose her client *and* her friendship.

Relationship Quality

The quality of the existing relationship is a critical component of receiver analysis because it can help guide decisions about how to communicate particular messages. In most basic terms, a relationship can vary along a continuum from negative to positive, as well as vary in intensity. Positive relationships can be weakly or strongly positive and the same goes for negative relationships. Relationships can be characterized in any number of ways. Here are a few:

suspicious ← → trustworthy

unstable ← → stable

new ← → established

contentious ← → cordial

Other relationship considerations are possible, depending upon the context of the communication.

The point here is that you need to have a good grasp of your existing relational quality with your receiver. You will have to communicate more carefully with receivers with whom you have a negative relationship than those with whom you have a neutral or positive relationship.

Your Turn: **Receiver Analysis**

Return to the "Your Turn" example of emailing your boss to let her know that you are ill and will not be at work in the morning. Provide a brief assessment of your receiver.

Content Needs

What does your receiver need to know?

How does your message impact your receiver? Or in other words, what's in it for them?

Relational Dynamics

Based on the earlier scenario and using the continua below, assess the dynamics of your relationship with your receiver.

Power. What is the power relationship between you and your boss?

Less power than boss ←	→ More power than boss

Familiarity. How familiar are you with your boss? Do you know him or her well?

Very unfamiliar ←	→ Very familiar

Formality. How formal of a relationship do you have with your boss?

Very informal ←	→ Very formal

Quality. What is the quality of your relationship with your boss?

Suspicious ←	→ Trustworthy
Unstable ←	→ Stable
New ←	→ Established
Contentious ←	→ Cordial

Questions to Ponder

1. How does your receiver analysis influence how you would write your message?

2. How might this receiver analysis be different if you had known your boss for several years?

Now that you know that business communication is both goals-oriented and receiver-centric, it will be easier for you to think about how to communicate strategically. Once you set your communication goals and understand better who your receiver is, you should be able to adapt your message to your receiver so that it has the intended effect.

Throughout this book, we will cover strategies for helping get your message delivered to your receiver in the way intended. But for now, let's turn our attention to competency development.

THE PROCESS OF COMPETENCE DEVELOPMENT

Being Competent is a Worthy Goal

By now, you've read the word *competent* multiple times throughout this book. You will continue to read it throughout the remaining chapters, too. So it is important to take a moment to understand what is and is not meant by the term.

Broadly, competence refers to your ability to do something proficiently. However, while competence infers a standard of performance that people normally aspire toward, for some people it is a word that also carries a negative connotation. That's because sometimes *competent* is used to signal that someone meets bare minimum standards or exhibits average performance.

But being competent is not about minimum standards. It is about possessing the knowledge, skills, and abilities to perform consistently at a high level. Competent communicators know how to approach communication challenges. They are confident in their abilities. They know that even in the most challenging situations, they will have a good result.

When it comes to communication, being competent is not about being average. It is about excelling at a set of skills that are difficult to master. So becoming a competent communicator is a worthy goal and something to be proud of achieving.

Becoming Competent is a Process

Here we describe how people become competent in general terms. Then we will turn our attention to what the core competencies of business communication.

Becoming competent is a difficult endeavor—no matter what it is you are working toward. Not only does competence development require you to learn new things, but it sometimes requires you to unlearn old things or break entrenched habits. Additionally, the process of becoming competent often makes people uncomfortable, at least for a little while.

Competency development occurs through a four-stage process.[1] The first stage is called *unconscious incompetence*. This stage refers to when you do not know that you do not know how to do something. Alternatively, you might not be aware that you are doing something incorrectly.

For instance, one bad habit that many people have is using filler words when they speak. They might say "umm," "you know," or "like" a lot when they speak. But if they have never paid careful attention to their speech habits, they might be unaware they use annoying filler. To themselves, their word choice sounds just fine. That's unconscious incompetence.

The second stage of competence development is called *conscious incompetence*. This is the stage where people become mindful of either something they do not know how to do or something they do incorrectly. For many people, this is a terribly uncomfortable stage. They may be embarrassed or frustrated to learn they are incompetent. In some cases, people may even try to deny that their incompetence is a problem by downplaying its significance. But they still are consciously aware at this point that there is a weakness.

If people learn of their use of filler words after delivering a speech in a class or at a Toastmasters meeting, if they hear a recording of themselves speaking, or if a peer or mentor points out the problem, that's when they enter the stage of conscious incompetence. Even though conscious incompetence is uncomfortable, it is a necessary step to becoming competent.

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1. The "four stage" model is reported to be developed by Noel Burch Gordon Training International as a teaching tool in the 1970s and was billed as the process of learning "any skill" (http://www.gordontraining.com/free-workplace-articles/learning-a-new-skill-is-easier-said-than-done/). In 1982, William S. Howell developed this framework into "competencies," settling on the figure that unconsciously competent communicators will save 75% of their work potential compared to less competent people doing the same job. William S. Howell, The Empathic Communicator (Belmont, CA: Wadsworth Publishing, 1986).

The third stage of competence development is *conscious competence*. This is the stage where people must work mindfully at doing something correctly. It takes a lot of mental energy to ensure you are performing competently. Going back to the example of filler words, people in the conscious competence stage who catch themselves using “like” too much, may likely stop every time they say the word and then correct the sentence. Or they may learn how to anticipate when they might say it and take a deep breath and think of a different word (or just consciously skip over “like”). They might also improve their ability to eliminate filler words by thinking through what they want and “practice” saying it silently before saying it out loud in order to avoid fillers.

The final stage is *unconscious competence*. This is the stage when people are able to perform competently with little, if any, thought. When people are skilled at something, others might remark, “They make it look so easy.” It is not that the skill is necessarily easy, but instead that people are so competent that they don’t have to engage in much conscious effort to do it well. For the people who mindfully work at using “like” less frequently, the task will eventually get easier and avoiding fillers will feel more natural. They will exert less mental energy to have the same filler-free delivery.

It is also worth noting that once you get to the stage of unconscious competence, it does not mean that you can stop working altogether. Even people who are talented at what they do have to keep practicing their craft mindfully. Otherwise, the old adage applies: If you don’t use it, you lose it. Therefore, people may sometimes slip back into a stage of unconscious or conscious incompetence and the progression through the stages will have to begin again.

CORE COMPETENCIES OF BUSINESS COMMUNICATION

Our purpose in developing this book is to help you build your business communication competence. With that in mind, we have identified five core competencies required of all business communicators. These are the standards by which business professionals tend to judge messages—whether those messages are emails, letters, reports, or presentations.

Professional
In order to represent themselves, their organization, and their profession well, business communicators must adhere to the standards of the broader business community. They exhibit care and attention to detail, use a courteous tone, and follow standard business conventions.

Clear
In order to facilitate effective and efficient business functioning, business communicators must create messages that are easy to understand and to act upon. They lead with the bottom line up front, organize points in ways that are easy to follow, use simple and unambiguous language, and make basic formatting choices to help the receiver process the message.

Concise
In order to be sensitive to the fast pace and time constraints of business, business communicators must deliver messages that are as short as possible while still being complete. At the big-picture level, they cut out extraneous information. At the detail level, they edit their documents to reduce wordiness.

Evidence-Driven
In order to guide well-supported business decisions, business communicators must deliver messages that are thoroughly supported by evidence. They describe the supporting evidence in clear and

compelling ways, they explain the credibility of their sources or analyses, and they use data displays to convey complex information.

Persuasive
In order to advance business goals, business communicators must deliver messages that convince their receivers to support a position or take specific action. They clearly state strong overarching persuasive positions, create and support logical sub-points, and adhere to ethical standards in their attempts to influence.

Each of the following chapters will cover these competencies one by one and provide you with practical advice and examples for how to demonstrate those competencies in your own business communication.

CHAPTER 2: PROFESSIONAL

Learning Objectives

By the end of the chapter, you will be able to:

- Describe the "Three C's" of professional communication
- Identify three general principles of business etiquette
- Detect messages that could trigger dissatisfaction or defensiveness
- Use a combination of strategies to reword statements to defuse defensiveness
- Explain the importance of care in conveying professionalism
- Identify and follow standard business conventions

You also will learn message design strategies for:

- Making direct requests
- Sharing good news
- Delivering bad news

INTRODUCTION TO PROFESSIONAL

Representing Yourself and Your Organization in a Business-Like Manner

Being professional is simultaneously the most important and the least important competency of business communication. This may sound strange—and impossible—at first. But it's true.

Think about applying for a job. If you submit a résumé filled with typos, chances are you won't be contacted for an interview, regardless of your qualifications. At the same time, you can have an impeccable résumé, but still be overlooked for a job if you don't meet the company's expectations—like not having enough years of experience or a particular certification. In this way, your professionalism is far less important than the skills and experience that make up the substance of your resume.

This most important–least important contradiction applies to all business communication, whether you are preparing emails, letters, reports, social media posts, slide decks, or any other kind of business document. Ultimately, the substance of your messages will be the deciding factor of whether you meet your goals. But if you turn off your receivers with *unprofessionalism*, they will never read or listen long enough to get to the substance.

This is because professionalism serves a **gatekeeping** function. That is, your receivers are going to determine whether to pay attention to your message based on how professional it is. If it is professional, they'll read it or listen to it because you appear (at least on the surface) to be competent and trustworthy. If it is not, they will likely disregard it—whether it's because the message is discourteous, sloppy, or "just doesn't look right." And obviously, you need your receiver to pay attention to your message if you are going to achieve any of your instrumental goals.

Professionalism is also important for establishing, building, and maintaining business relationships. Whether you are writing a report to your manager or instructions to your employee, professionalism signals respect for your receiver. When you present a carefully worded, professionally formatted report to your manager, he or she might think, “Look at the time and effort put into this document. This employee clearly respects me.” Similarly, when you send instructions to your employees that are courteous and careful in tone, they might think, “Our manager respects us and values the work that we do.”

Professionalism plays a role building your own reputation, too. How you communicate is a reflection of you. So when you communicate professionally, your bosses, coworkers, employees, and customers will be more likely to think of you of as an overall competent professional. Because you also represent your organization (or department, committee, club) when you communicate, you will build its credibility as well.

There are “Three C’s” of being professional in business communication: *courtesy*, which is using a polite, conscientious, and civil tone; *care*, which is paying attention to details to ensure there are no mistakes; and *conventionality*, which is following business norms and standards (sometimes called “conventions”). In this chapter, you will learn more about each “C” and get specific strategies for how to infuse professionalism into the messages you compose.

COMMUNICATE COURTEOUSLY

The first "C" of professionalism is courtesy. **Courtesy** refers to your ability to adhere to standards of etiquette, to behave civilly, and to demonstrate tact and emotional control. Courtesy can be one of the most difficult aspects of professionalism to master—even for people who are generally very polite. This is because sometimes even a tiny detail can cause receiver to interpret messages as rude or discourteous.

Courtesy involves two broad principles that help you craft your messages: following general principles of business etiquette and defusing defensiveness.

Follow General Principles of Business Etiquette

At the most basic level, there is an expectation that business communication should follow basic business etiquette. This does not mean that messages must be formal and stuffy, but they do need to be polite. Basic business etiquette is more than simply good manners. It sets the professional tone that creates a positive relationship and allows your receiver to see the true intent of your message.

By this point in your life, you probably have a strong sense of what constitutes politeness. Here are a few tips that may be a little more business-specific.

Address People Properly

One of the ways you can demonstrate courtesy is by how you address your receiver. Proper attention to addressing people sets them at ease and helps them feel respected. Improper addresses may create tension, annoyance, or even anger. While some people may never think twice about how they are addressed, others may be offended (and then think that you are unprofessional) if you address them in ways they think are improper.

Ideally, you should address people the way they have asked you to address them. But often in business you may not know this information, as you may be contacting someone for the first time. For instance, if you are writing an email to James Mackey, you may be unaware that different people refer to him in a variety of ways: Mr. Mackey, James, and Jimmy, depending on how well they know him.

Proper business etiquette dictates that as a rule, you should address someone formally at first. So when you first meet, you would call him Mr. Mackey and address any emails accordingly. If he gives you explicit permission to call him by his first name, James, then you should. But even if you hear others in the office call him Jimmy, you should wait until he signals his permission or explicitly ask him his preference of how he'd like to be addressed before you take that liberty. For women, proper forms of address are even more complicated, as explained in the Communication Tips box.

Communication Tip: **Miss, Mrs., or Ms.?**

One unique challenge of business etiquette is how to address women. While the honorific title for men is simply "Mr.", there are several nuanced options for women, each of which carries important connotations. Of course, you should use the honorific that your receiver prefers. But if you do not know which one that is, then follow this advice:

Miss is a term that traditionally refers to young, unmarried women or girls. It is most appropriate when addressing receivers under the age of 18. While some adult women prefer this term, many women may be insulted because it can imply that they are not being acknowledged as serious adults. In other cases, it may be incorrect, such as when a woman is married.

Mrs. is a term that refers to a woman who is married. Again, some women prefer this term—with it being more popular among older generations. But this honorific is particularly challenging because it requires you to know a few things: first, that the woman is married (or possibly widowed); second, that she uses her spouse's surname; and third, that she wants her marital status explicitly acknowledged. If either of the first two conditions is not true, then Mrs. is factually incorrect. If the third condition is not true, then even when Mrs. may technically be correct, it could be potentially offensive.

Ms. is a more generic honorific and one that applies to most women in business because it does not connote marital status. It applies equally to married and unmarried women. So even if a woman is married and prefers Mrs., Ms. still is accurate. Therefore, Ms. should be your default honorific for women, unless you have specific knowledge of a different preference.

And one last thing to keep in mind. If a person—regardless of gender—has earned a special status or credential, then that honorific should take place of Ms. or Mr. This goes for anyone who has earned a military rank (e.g., Maj. or MSgt.), a clergy title (Rev.), or an occupational or educational credential (e.g., Dr. or Prof.).

Make Requests Politely

In business, you may find that you spend a lot of time making requests of people. Whether you are delegating a task to an employee, asking a customer for a payment, or seeking approval for vacation time, you are making a request.

Politeness is a communication strategy that is used to ensure that everyone involved in a communication exchange feels affirmed or at least not threatened. In the case of making requests, there is a range of specific tactics for softening the threat of imposition.[1]

One of the simplest ways you can make requests politely is by saying "please," "thank you," and "you're welcome." These expressions, which you were taught to say as a child, can be just as important in business as they were in elementary school. Even the simplest polite words can soften your request to your receiver.

> ***Impolite:*** Submit your expense report by Friday.
>
> ***Polite:*** Please submit your expense report by Friday.

Even if you have the authority to tell people to do something, it is more affirming for them to be asked. Therefore, another approach to polite requests is to frame the request as a question. Often the question is one that, in practice, is more of a statement than a question. But the less demanding way of expressing it will come across more politely, especially when you are communicating with someone who is expected to comply with your request (like the office intern).

> ***Impolite:*** Make these copies for me.
>
> ***Polite:*** Will you make these copies for me?

Finally, you may also indicate the request is voluntary and not required. This approach typically includes an "if" statement accompanied by an expression of appreciation. More often, this approach is used when making a request of someone higher-powered than you or someone who does not have to fulfill your request.

> ***Impolite:*** I need you to fill out this survey.
>
> ***Polite:*** If you are willing and able to fill out this survey, I would greatly appreciate it.

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1. Brown and Levison developed "politeness theory" to explain various strategies for reducing threat to people's esteem in various communication situations. You can read their Penelope Brown and Stephen C. Levinson, *Politeness: Some Universals in Language Usage* (Cambridge, UK: Cambridge University Press, 1987).

Refrain from Profanity

Four-letter words are tricky in professional communication. While some organizations have cultures where swearing and profanity are acceptable, it can get you into trouble. In fact, a research study indicated that people who swear may be perceived by coworkers and bosses as socially inept, incompetent, and untrustworthy.[2] Even if you do work in an organization where swearing is acceptable in casual conversation, it is a good idea to avoid swearing in written messages. Doing so creates a permanent record of less than professional language. And those messages can be read with more insidious intent or anger than was intended.

Detect and Defuse Defensiveness

When it comes to delivering bad news or a challenging message, being courteous becomes even more important—and often more difficult. That is because when people receive bad news, they often become more sensitive to messages. They may become more emotional and respond with irritation, anger, or sadness. If their own identity is threatened in some way, they may become defensive. That means that they may become more critical of the words that you use and judge you more harshly.

For example, research shows that receivers tend to read messages in less positive ways than they were intended.[3] Perhaps you may have already experienced this personally if you ever thought you sent a text message to a friend or family member who accused you of being rude.

If your receivers are defensive, achieving your goals is going to be difficult, if not impossible. Chances are if a receiver is defensive, you may have already betrayed your explicit or implicit relational goals. The

2. Danette Ifert Johnson and Nicole Lewis, "Perceptions of Swearing in the Work Setting: An Expectancy Violations Theory Perspective," *Communication Reports* 23, no. 2 (2010), https://doi.org/10.1080/08934215.2010.511401.
3. Kristin Byron, "Carrying Too Heavy a Load? The Communication and Miscommunication of Emotion by Email," *Academy of Management Review* 33, no. 2 (2008), https://doi.org/10.5465/amr.2008.31193163.

defensiveness and the bad relationship then snowball to create a poor identity meaning (the receiver may think you are inconsiderate, condescending, or just rude), which will make it hard to achieve your instrumental goals.

Anticipate Receiver Dissatisfaction

One of the first things to do to deflect defensiveness is to be attuned to when you are communicating a message that your receiver may not want to hear. In particular, you should be assessing your message for whether your receiver will be satisfied, neutral, or dissatisfied with your message.

Some of the things that can generate dissatisfaction are loss of time or money (e.g., a fee increase), loss of opportunity (e.g., a candidate was not hired for a job), increase of effort or work (e.g., an additional work task), personal judgement (e.g., a less-than-perfect job evaluation), or any response which includes the answer "no."

When you anticipate receiver dissatisfaction, then you need to put yourself on high-attention mode as you craft your message. Below we provide several strategies for writing more sensitive messages.

Replace Negative Language with Positive Language

When people hear negative words, it can trigger a negative response—even if the intent of the message is positive. When the message you are sending is a disappointing one, negative language only adds to the risk of generating defensiveness.

A good strategy to defuse defensiveness is to use as much positive language as possible—or at least neutral language. This doesn't mean that you are changing bad news to good news. Instead, it means that you are delivering the intended message with the most positive tone possible.

To change negative language, you can do the following. First, search for any "no," "not," "un-," and "in-" words. When you spot a sentence with a negative word, rework the sentence to convey the same meaning with positive words.

Negative Statement: We will not review your budget request because it is incomplete.

Negative Words Identification: We will not review your budget request because it is incomplete.

Positive Statement: Once you submit your completed budget request, we will review it.

Note that in the example, you did not change your position from the negative statement to the positive statement. You still are requiring your receiver to submit a complete budget request before you review it. But the reworked example is more positively expressed, and therefore more likely to be received well.

Eliminate “You” Language

When you express or even imply judgments about your receiver, you are likely to generate defensiveness. Just read the comments section of any online news article and you will quickly see a litany of ways that people pass judgment on others. They hurl insults, call names, and make blanket categorizations. You do not even have to be so blatant for your receivers to perceive you have judged them.

In business, you must be particularly careful about passing judgment on people in ways that call into question their intelligence, competence, work ethic, moral judgment, and maturity. Even if you are not trying to pass judgment, sometimes it can come across that way. Receivers can feel as though you are pointing a finger at them.

In your messages, look for sentences containing the word “you.” If that statement could possibly be considered to be judgmental, attempt to rewrite it. One approach for rewriting is to use “I” or “we” statements instead of “you” statements.

Even though the differences may be subtle, there can be a big difference in how the message is received.

You Statement: You misunderstood the terms of service.

We Statement: We should have communicated our terms of service more clearly.

In this example, the "you" statement makes the claim that the receiver did something wrong, which could induce defensiveness. The receiver may possibly even think that you are claiming he or she is unable to understand the terms of service, which could be perceived as an attack on their intelligence. In the "we" statement, you are deflecting the blame for the misunderstanding away from the receiver and back to you.

If using "I" or "we" statements doesn't work well, you also can divert attention away from the receiver by focusing attention on other things. For example, consider the following two examples.

> ***You Statement:*** You made several errors in the code.
>
> ***Diverted Attention Statement:*** There were several errors in the code.
>
> ***You Statement:*** You were not selected for the position.
>
> ***Diverted Attention Statement:*** We filled the position.

In the diverted attention statements, the focus shifts off the receiver. While the receivers may know that they were responsible for the errors in the code and will know that they were not selected for the position, the reworked messages are less judgmental because there is no direct finger pointing with the word "you."

Communication Tip: **Keep Calm and Email On**

Sometimes in business, you might get frustrated or outright angry at a person with whom you are communicating. Perhaps you are frustrated with one of your employees for coming in late or you are angry with a supplier who has made a mistake in your order. As upset as you may be, proper etiquette dictates that you remain calm in your interactions.

You don't need to be standing in the same room with angry people to know that they are angry. It can even come across in written messages. Some of the telltale signs are calling names, hurtling insults, and using profanity. Even things such as text emphasis (CAPS, underlining, bold, bigger font sizes) and exclamation points can signal anger.

Sometimes it can be difficult to resist writing an email response when you're upset. Therefore, we recommend three specific approaches you can use to retain your professional reputation.

Write-and-Delete. Go ahead and write a full-blown nasty message. Then promptly delete it. The process might help you blow off steam so you can then write a professional message that achieves your goals.

Write-and-Wait. If you are angry and attempting to write a professional message, you still might not be as calm and professional as you need to be. So compose the message, but don't click send. Come back and read it later (a couple hours if you are a little angry; 24 hours if you're really angry). Then make the changes necessary when you're in a calmer state of mind.

Write-and-Get-Help. Just like the old-time bosses who would get help from their administrative assistants to avoid courtesy pitfalls, you can do something similar. Find a trusted colleague who will give you honest feedback and ask that person to read and edit your message to take out anything that is potentially discourteous.

With all three of these approaches, we recommend that you don't type any names in the "To" line. If you accidentally click send instead of save, the message can go out with detrimental consequences.

Authentically Acknowledge Your Receiver's Feelings

Human beings all have feelings and emotional reactions. Disregarding, invalidating, or displaying neutrality towards those feelings can actually increase the negative reaction to a situation. Think about some of your own business interactions that have raised strong feelings. Perhaps you've been stranded in an airport before an important business meeting. Perhaps you've been frustrated by dealing with the fallout from identity theft. Perhaps you've lost your job because of downsizing.

When communicating with receivers who may be having an emotional reaction to a situation, it is important to acknowledge their feelings—especially negative feelings such as anger, sadness, or frustration. The first step for acknowledging your receiver's feelings is first to do a quick emotional scan of the situation. Is your receiver showing any indication of having an emotional reaction? This could include explicit declarations of his or her emotional state ("I'm really upset!"), subtle or not-so-subtle implicit signals (typing in all CAPS), or acknowledgement of some event that can be safely assumed to cause emotional distress

The next step is to make a brief and authentic expression of empathy. Of course, it is important to keep your own goals in mind and not to go too overboard in your expression of empathy.

For instance, assume that your employee Marcus has written an emotionally-charged email complaining about his recent performance review. You have concluded the review is accurate so it won't be changed. How you acknowledge (or invalidate) his feelings could lead to much different results.

If you do not acknowledge Marcus' feelings anywhere in the message and just stick to the facts, he may remain frustrated and judge you to be cold and harsh. If you go overboard in acknowledging his feelings ("I can tell you're upset. I would be upset, too, if I were you."), Marcus may end up feeling even worse, or perhaps he might have some sort of grounds for escalating his case to a higher authority. If you invalidate his feelings ("I don't understand why you're upset. This isn't a big deal."), it could lead to the worst effect of all. With Marcus now being upset both about the original review and because of the insult, you could be viewed as a total jerk.

Consider instead, a more appropriate response. You authentically and briefly acknowledge his feelings by saying, "I understand that you were hoping for a better performance review and are upset by some of the scores." You have then set the stage for calmly and professionally explaining your answer.

Talk *With* or Talk *Up To,* but Don't Talk *Down To* Your Receiver

Perhaps you are "above" your receiver in some way. You may have a higher position of authority in the company. You may have more experience or knowledge of a certain topic. You may have more status and influence. You may have the power to fix the receiver's problem. But implicitly or explicitly pointing out your superiority will only raise defensiveness.

If your interaction with your receivers includes condescension, rudeness, or anything they can interpret as an attitude of superiority, you are likely to raise their hackles. Even if that is not your intent, it can be a serious problem for generating defensiveness. Some of the ways this occurs are when you talk down to receivers, use a condescending tone, or draw attention to their lower position.

> ***Talking Down:*** Maybe someday when you have as much experience as I do, you will understand why that idea won't work.
>
> ***Talking With:*** Let me explain why that won't work.

In the "talking with" example, you have minimized your status difference and positioned yourself as a peer, or perhaps an approachable mentor or supervisor who is committed to their professional development.

It also is important to note that if you are "below" your receiver in some way, "talking with" can be just as problematic. When you position yourself as equal to someone above you in the organization, it can generate as much defensiveness as talking down to a peer or subordinate because you have effectively "lowered them" to your level.

"Talking with" might occur if you communicate with superiors in too friendly of a tone or call them by their first names before you've received implicit permission to be on a first-name basis.

And "talking down" to a superior can be downright detrimental. For example, you may write to your manager saying, "Please approve my vacation request by Friday." Even with the politeness of the word "please," your manager may still think that you overstepped your bounds by telling him or her what to do.

Change the Channel

Another valuable strategy for defusing defensiveness is to change the communication channel. What is meant by communication channel is the method by which you communicate. This includes things like email, phone, online meetings, and face-to-face communication.

Channels vary in the amount of "richness" they contain. Richer channels, like online and face-to-face meetings contain words, tone of voice, facial expressions, and body language. Thin channels like text messages and email carry only words. Not surprisingly, thinner channels can be easier to misinterpret as cold and uncaring.

Therefore, if you have a difficult message to deliver or if it appears tensions might be escalating with every back-and-forth email reply, you might consider changing channels. Instead of putting the negative information into a thin and cold email, pick a richer and warmer channel.

You might be surprised that with the additional cues of tone of voice or facial expressions that you just might be able to solve a problem much faster and eliminate defensiveness altogether.

Your Turn: **Detecting and Defusing Defensiveness**

Read the statements below. What is it about each one that might provoke dissatisfaction? Try to rewrite the sentence to defuse defensiveness.

You were not as qualified as the other applicants.

I won’t stay late to do that assignment.

Parking fees have increased this year.

We will not be authorizing any more vacation requests for the month of July.

Employees are not allowed to telework on Mondays and Fridays.

You are dressed inappropriately for the office.

Questions to Ponder

1. How would you react if you were the receiver of these original messages?
2. How would you react if you received one of your revised messages?
3. How do you think people would react to you if you used more positively-worded messages?

PRESENT MESSAGES WITH CARE

The second "C" of professionalism is care. **Care** in business communication deals with your ability to pay attention to the details, and to present yourself without mistakes, sloppiness, or other things that can detract from your message. The consequences of carelessness can be devastating. You may come across as sloppy and inattentive and, as such, not the right person to hire or promote. That negative image may also be projected onto your company as a whole, which could adversely impact business.

Some carelessness may even cause costly business problems. If a typo goes undetected, you may under-charge a client for work performed (wrong price), book non-refundable travel arrangements (wrong date), or miss out on a major sales lead (wrong contact information). In fact, an entrepreneur from the United Kingdom estimates that simple spelling errors cost online businesses millions of pounds every year in lost sales.[1]

Here we cover two broad strategies for demonstrating care.

Find and Fix Mistakes

Sure, everyone makes mistakes. Most of the time, people in business will forgive a small and inconsequential mistake. But a pattern of mistakes in your messages can signal a much bigger problem. Mistakes can include spelling mistakes, grammar errors, and typos.

Unfortunately, finding mistakes in your own writing can be quite difficult. One reason why it is harder to spot your own mistakes is because you know what you are trying to say. When you are reading your own writing, your brain will fill in the gaps and make the corrections for you. Another reason is that if you have been working on a message for a while, chances are

1. Sean Coughlan, "Spelling Mistakes 'Cost Millions' in Online Sales," *BBC News*, July 14, 2011, https://www.bbc.com/news/education-14130854.

that you may be getting tired. So you might be skimming instead of reading closely. Even if you are making an effort to read closely, if it is something you've already read a time or two, your brain will again fill the gaps for you.

Here are two broad strategies to help you spot and correct mistakes.

Use Technology

Technology will not magically fix everything, but it can help you find the obvious. All word processing applications, even those that are online, have built-in spell checkers and grammar checkers. Many email programs have automatic spell check options that can check your messages before they are sent to help you catch mistakes. Even most social media platforms and comment forms online have spell checkers, or you can install free plugins from organizations such as Grammarly.

But don't rely only on automatic checking and defaults. Even when misspelled words are automatically highlighted, it is worth running an additional spell check before finalizing longer documents. If you use unusual names or words frequently, add them to your word processor's dictionary. That way, the software can assist you in spotting spelling errors.

Proofread

The human eye can spot even more mistakes than a computer can, assuming you have trained yourself to read carefully. Here are some helpful approaches.

Read Your Message Carefully
Get in the practice of rereading every message from top to bottom before you send it. Do not skim it, read it. *Slowly.* Even if you haven't made any spelling errors, you may find that you have omitted a word, left in a fragment of a sentence, or used a wrong version of a word (like *their, there,* or *they're*).

Read from Bottom to Top
After your read from top to bottom, read back up from the bottom of the message. Often when you are rereading something you have written, your brain will fill in the missing pieces and you will see what is not there. Your brain is forced to pay closer attention in reverse.

Start at the bottom of the document and read to find missing or misplaced words, sentences, or even paragraphs.

Read out Loud
It may feel strange at first, but when you read your messages out loud, your ear will likely pick up mistakes that your eyes simply miss. If you feel too awkward reading your own message out loud, have your computer read your messages to you. You can use some of the accessibility tools built into your computer software to read your files. Simply listen to that computer-generated voice. It can be a great way to spot grammatical errors.

Let it Sit
If you have time to spare, one of the best things you can do is to put your document aside for some time. Even an hour or two away from the screen will allow you to rest your eyes and "clear the slate." When you come back to read it later, you will be able to better spot your own errors.

Ask a Coworker to Proofread
Again, it is easier to spot someone else's mistakes than it is to spot your own. Of course, this solution is impractical for all of the email messages you send in a day. But if a document is high priority or if it is particularly long, get a coworker to read it for you. That person will be able to spot errors. (They may also be able to point out any parts that are unclear—but more on that in the next chapter). Having a coworker proofread might be especially helpful for reports or PowerPoint slide decks.

Attend to Details

Another component of care is presenting yourself as consistently and neatly as possible. Here, it's not just about eliminating actual mistakes, but also about attending to little details that differentiate sloppy communication from polished communication.

Consistency
Consistency refers to doing something the same way every time. Inconsistencies can show up within a single document or single presentation and signal a lack of care. For example, a report might be single spaced throughout, except for a few random paragraphs that

are double spaced. Or a presentation slide deck may have some slides in one font and then other slides in a different font.

Neatness
Neatness refers to presenting yourself in an orderly way. It looks different depending upon what kind of message you are sending and how it is being delivered. Some examples of business communication that doesn't meet the standard of neatness include documents that still have sections that are missing or incomplete, emails that are missing attachments, messages that are sent to the wrong email address, images that are skewed or highly pixilated, and handouts that are bent.

Even though details such as these may seem nitpicky or inconsequential, cumulatively they can impact the overall professionalism of your message. So taking extra time to attend to the details of your message is important.

FOLLOW BUSINESS CONVENTIONS

The third "C" of professionalism is conventionality. **Conventionality** refers to your ability to conform to professional expectations (format, style, etc.). For instance, a résumé looks like a résumé, a report looks like a report, and an email looks like an email. Following conventions is important in business because it implicitly signals that you belong in the community. You know the rules and you know how to follow them. Alternatively, if you break the mold, you do it with high-quality creativity so that your receiver has no doubt that you still know the rules and belong in the community.

Conventions of business communication are culturally bound. They differ from country to country, and to a lesser extent, from organization to organization or industry to industry. Generally, conventions remain fairly constant and slow to change, although they may change rapidly with new technologies or as societal standards change.

You can see some of the changes to conventions most vividly in how people dress for business or in how email technologies changed how people write memos, and text messaging and instant messaging changed how people write emails. For example, following the COVID pandemic, dress codes have become decidedly more relaxed.[1] Communication has become somewhat more casual over the years with it becoming more common for business people to use emojis in emails.[2]

1. For a story about how dress codes have become more relaxed since the COVID pandemic check out: Rachel Martin and Milton Guevara, "The Pandemic Has Changed Workplace Fashion. What Does That Mean to You?" *NPR*, July 7, 2022, https://www.npr.org/2022/07/07/1109317208/pandemic-workplace-fashion.
2. Research has shown that when leaders use emojis, it can help them better communicate with their employees and reduce defensiveness. Read more at: Tomoko Yokoi and Jennifer Jordan, "Using Emojis to Connect with Your Team," *Harvard Business Review*, May 30, 2022, https://hbr.org/2022/05/using-emojis-to-connect-with-your-team.

Identify and Follow Conventions

So how do you identify conventions, especially of business writing and presentations? Well, there are numerous examples provided in books—from how to write cover letters to how to develop a PowerPoint presentation. We won't go into details of all the different conventions here. Instead, we offer basic steps you can follow to learn what the conventions are for any type of message.

Gather Examples of a Particular Message Type (business letters, annual reports, etc.)
These will be most helpful if they are gathered from within your own company or at least your own industry. You can also search the Internet for examples of any kind of document.

Look for Similarities Across the Examples
These can be in how things are formatted (fonts, colors, white space), how content is ordered, or even particular turns of phrase that are used with regularity. The similarities you notice are the standards of the conventions.

For example, if you look at business letters, you will likely notice several similarities. Business letters normally appear on some form of company letterhead (i.e., the stationery that has the company logo on it). The information is ordered in the same way (date, name and address of the receiver, a salutation, the letter itself, and a signature block). Paragraphs are single spaced with blank lines in between. Those are the standards and you should not deviate from them.

Look for Differences Across the Examples
Now look for ways in which the documents differ from each other. The differences demonstrate where there is wiggle room.

Things that might look different are varying fonts, sometimes the salutation uses "Dear" and sometimes not, sometimes the closing says "Sincerely," but other times it says "Regards," or "Best," or something similar. Sometimes paragraphs are indented and sometimes not. Those are the areas of wiggle room. In those regards, you can use your judgment and personal preference to decide how you want to write the letter.

Check for Company Guidelines
Another thing to keep in mind is that your company may have its own strict guidelines for how it wants messages to be formatted. Company standards are more common in large companies than small ones. For instance, your company may have a designated template to use for PowerPoint presentations that includes approved company colors, fonts, and logos. These can be called "brand standards," and they are particularly important if you are communicating with external receivers.

Break Conventions Carefully

In some instances, you may decide you want to break the conventions to catch your receiver's attention. You can do this by exhibiting high-quality creativity. The catch is that any time you break the conventions, it must be both high-quality *and* creative. Anything less risks looking like an unprofessional error. You have to decide whether the potential payoff of breaking the convention to catch attention is worth the risk of being judged unprofessional or incompetent.

Résumés are a common document in which people break conventions. Let's face it: the job market is competitive, and you need to stand out. Unconventional approaches to résumés can include things like infographics, online portfolios, video showcases, and QR codes that link to websites or blogs.[3] Nontraditional formats like these can draw positive attention and show off your skills—especially if you are seeking a job in a creative field. But other human resource professionals warn that creative resumes may actually prevent you from getting called for an interview. If you are not sure about your ability to demonstrate both high quality and creativity, you are more likely to have a better outcome following the established conventions.

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3. See: Cheryl Vaughn, "The 7 Best Alternative Resume Formats for Professionals," *Make Use Of*, February 19, 2022, https://www.makeuseof.com/best-alternative-resume-for-professionals/.

Your Turn: **Create Your Own Email Signature Block**

One of the conventions of business communication is the email signature block. It is a pre-formatted block of text with contact information of the sender. It usually contains the person's name, job title, company name, and contact information. Oftentimes, business people will customize their signature blocks with the company logo or with company colors.

Following the advice above for identifying conventions, find 3-5 email signature blocks from business professionals you know.

- What similarities do you see between the examples?
- What differences do you see?
- Which signature blocks do you like best?

Now develop your own signature block for yourself. Once you like how it looks, you can set your email program to append your email signature block to your outgoing messages.

PUTTING IT INTO PRACTICE

As you saw at the beginning of this chapter, being professional is an important business communication competency. By exhibiting courtesy, care, and conventionality, you will get past the initial hurdle of business communication: getting your receiver to pay attention to your message and to take you seriously. Moreover, being professional sets the stage for developing the other core competencies.

You should now be ready to begin practicing and applying the professional competency. The majority of the writing people do each day in the workplace involves professional correspondence. Therefore, in this section, you will learn strategies for writing the three most common kinds of professional correspondence: the direct request, the good news message, and the bad news message.

Message Strategy: Making a Direct Request

One type of message that you will have to send is the *direct request*. Direct requests are used when you ask someone to do something for you or give something to you. When you assign someone a task or ask for a favor, you are making a direct request. Obviously, your instrumental goal with the direct request is for your receiver to grant the request. But don't forget your relational goals either. You need to acknowledge your relationship with the receiver in appropriate ways when you make a request.

For example, assume that you are asking your receiver to fill out an expense report by Friday. If you are the boss and you are making the request to your subordinates, that message may look much different from a message that you send to your boss to fill out her expense report.

A direct request typically follows this structure:

Make the Request Politely

You may signal politeness by framing the request as a question (Would you be willing to write me a letter of recommendation?) or by using polite words (Please fill out your expense report by Friday).

Provide a Justification for the Request, if Necessary

If you have a tight deadline, for example, you may explain why you weren't able to provide more leeway. The point here is for you to think of any questions or objections your receiver may have and address them upfront.

Provide Details Your Receiver Needs to Complete the Request

For instance, if you are asking people to indicate their availability for a meeting, you might provide the options for the meeting. Or if you're asking someone to write a reference letter for you, you should include the contact information for the person to whom the reference will be sent, the job description, and your current résumé.

Express Appreciation

Research shows that receivers are much more likely to offer help—and offer high quality help—when they feel appreciated (Grant, 2008). So make sure to say thank you. If it is a request that you are relatively sure the person will respond positively to, simply say "Thank you." If it is a genuine request that your receiver may or may not agree to, you may want to end with something like, "thank you for considering my request," which acknowledges that they have the right to say no. If it is a big request, you may want to express even more appreciation, as appropriate. For instance, "Thank you. Your support of my career really means a lot to me."

SAMPLE DIRECT REQUEST MESSAGE

TO:	michael.jones@hfcu.org
SUBJECT:	Request for Professional Recommendation

Mike,

I am applying for a new position at HFCU. I need to get three professional references. Would you would be willing to serve as one of my references?

Because you were my manager when I first started in the Member Services Department, you know me and my work ethic quite well. I am hoping that you would be willing to speak to my customer focus and interpersonal communication skills.

The position I am applying for is a consumer loan officer. I'm attaching a copy of my current résumé and the job posting to this message. The letter should be emailed to Adam Kieslinger, SVP Consumer Loans (adam.kiselinger@hfcu.org).

Thank you so much for considering my request. I appreciate all you have done to support and mentor me in my career here at HFCU.

Warmly,

Kallie

Kallie MacGregor
Consumer Loan Processor | HFCU
890 Main Street
Hometown, KY 40200

kallie.macgregor@hfcu.org
(502) 555-1279

Message Strategy: Sharing Good News

From minor good news (like authorizing an expense request or announcing an increase in quarterly sales) to major good news (like notifying your team of an unexpected bonus or announcing a special award), sharing good news tends to be a pleasant task.

Because the receivers of good news are going to be pleased with the content of the message, they are going to be far less critical of how it is delivered. If you are telling your employees that they are receiving a $500 quarterly bonus that they weren't expecting, you likely could bumble your entire way through the message and it likely will still be received well. But that doesn't mean you shouldn't make an effort to be professional.

Let's go over a few tips for good news messages.

Lead with the Positive

Start your message by stating the good news directly. You may even tip off your receiver with the subject line by including "Request Approved" or "Congratulations!"

Fill in the Detail

Provide any detail or information the receiver will want or need. If you are approving a travel request, you might include information on how to complete pre-trip authorization forms and post-trip expense reports. If you are sharing news about a scholarship award, you might include information about the pool of applicants to emphasize the specialness of the award.

Close with the Positive

By reiterating positive news, you can end you message on just as much of a high note as you started it. The amount of positivity should match the degree of good news. So your closing positive statement might range from expressions of goodwill to restatement of enthusiastic congratulations.

SAMPLE POSITIVE NEWS MESSAGE

TO:	taylor.silvis@hfcu.org
SUBJECT:	Congratulations! HFCU Employee of the Year

Dear Taylor,

Congratulations! We are pleased to announce that you have been selected as the Hometown Federal Credit Union Employee of the Year.

The Employee of the Year Award is an incredible honor. Of the more than 200 employees at HFCU, you were selected based on your work ethic, positive attitude, and commitment to our customers.

You will receive a plaque and a $500 bonus that will be included in your next paycheck, and we will be sending an announcement to Hometown Daily News to feature this award in the community spotlight. Joe Swanson, from the Marketing Office, will soon be in touch with you to get a photo and some information for the news release.

Again, congratulations on this terrific award. And thank you for your service to HFCU.

Neil

Neil Smith
Talent Manager | HFCU
890 Main Street
Hometown, KY 40200
neil.smith@hfcu.org
(502) 555-2013

Message Strategy: Delivering Bad News

Unfortunately, there will be many times in business when you must deliver bad news. Perhaps you need to let a customer know a product they ordered is no longer available. Perhaps you will need to deny someone a refund or a request for time off. You may have to let employees know their workload is going to increase (without additional pay) to cover for an employee who left the company.

Composing bad news messages is a much more challenging task than composing good news messages. Bad news messages can trigger a range of negative responses in your receiver—from disappointment to outright anger. Furthermore, receivers of bad news tend to be much more critical judges of how the message was sent. So when you're sending bad news, the need to be professional and courteous is even stronger than when you're delivering good news.

You should plan your message in a way that reduces dissatisfaction, creates goodwill, and improves or restores your relationship with the receiver. A general strategy for reducing the blow of bad news is to use an *indirect* approach. Here is the basic outline of an indirect bad news message.

Lead with a Neutral Opening

Unlike direct requests and good news messages where you jump right in, bad news messages should not start with the bad news. Instead, begin with something more neutral. For example, if you are notifying someone that they were not selected for a leadership program, you might begin by thanking them for applying.

State the Facts

In the next step, identify any facts, policies, or other information that will set up your decision.

Gently State the Bad News

Now it is time to announce the bad news. You need to be clear. But you do not need to be harsh. If there is any way to soften the wording of the bad news, you should soften it. There is a difference between, "We rejected your application" and "You were not selected for the leadership program."

Acknowledge Emotions

Some bad news is only mildly disappointing. Other bad news can be devastating. If you can reasonably foresee that your receiver will have a strong and negative reaction to your message, you should acknowledge those emotions in an authentic way.

Close with Goodwill

Finally, close the message with another expression of goodwill. Thanking your receiver or offering encouragement are ways to share goodwill.

SAMPLE NEGATIVE NEWS MESSAGE

HFCU 890 Main Street • Hometown, KY 40200 • www.hfcu.org

April 19, 2024

Mr. Douglas C. Foster
217 Elm Ave.
Hometown, KY 40211

Dear Mr. Foster:

At HFCU, we are always striving to improve the products and services we offer to ensure that you get the best overall portfolio of financial products. Sometimes that means that we need to make some changes to those services. Because you have a Hometown Basic Checking Account, we are writing to inform you about an upcoming change to that account.

Effective June 1, 2024, ATM transactions made at non-HFCU machines will incur a $2 service fee. This fee is in addition to any charges directly charged by the non-HFCU machine.

While this change may make some transactions more expensive, we would like to remind you that you always get free ATM transactions at each of HFCU's 13 conveniently located ATMS. We have included a small map in this mailing with all our ATM locations.

Additionally, you will retain all of the other great features you have come to expect from the Hometown Basic Checking Account. There is no monthly service fee and no minimum balance. You will have access to a free online bill pay service on our website or on our mobile app. You can use your HFCU Visa® card without any fees. You also are eligible for one free box of checks each year.

If you have any questions about your Hometown Basic Checking Account or any other HFCU services, please do not hesitate to call or to stop in at any of our branches.

We look forward to continuing to serve your financial needs.

Sincerely,

Durae Dahlin
Vice President, Member Relations

CHAPTER 3: CLEAR

Learning Objectives

By the end of the chapter, you will be able to:

- Describe several strategies for increasing the clarity and focus of your message
- Write a bottom-line up front (BLUF) introduction
- Identify several techniques for writing clearer sentences and paragraphs
- Format documents for High Skim Value

You also will learn message design strategies for:

- Documenting decisions
- Documenting employee performance
- Reporting improper or illegal behavior

INTRODUCTION TO CLEAR

Delivering Messages That Are Easy to Follow, Understand, and Act On

The second business communication competency is *clear,* which means making messages easy for your receiver to interpret and to act on. Being clear is one of the traits almost universally identified by academics, professionals, and employers as a necessity for effective business communication. Whether in a 20-word social media post or a 20-page formal report, being clear is essential to accomplishing your goals. Clear messages are important for several reasons.

First, clear messages are easier to understand and act on. Most business messages directly request or indirectly support some kind of necessary action: questions need to be answered, instructions need to be followed, or decisions need to be made. When your messages are clear, your receivers will be able to understand the necessary information for taking action.

Second, clear messages are easier to scan, read, recall, and reference. People in business read for instrumental purposes—they need to be able to get work done. Because people are busy, they want to scan messages to see what parts, if any, they should pay attention to. If they need to read the whole thing, they want to be able to read it (or skim it!) as quickly as possible. They also want to be able to go back to the message at a later time and read only the parts they need. When you carefully craft your messages to be clear, you help your receivers process your message.

Third, clear messages are more efficient. Think about some of the unclear messages you've received and how much time you wasted either rereading the message multiple times to try to figure it out, asking a colleague to help you interpret it, or responding back to the sender with questions of clarification. Also think about how much time you wasted—and how much frustration you created—trying to follow instructions that weren't clear. Business communication expert Paula Lentz calculates that a company with

1,000 employees can easily waste more than $1.5 million of employee productivity every year just on clarifying internal email messages.[1]

Finally, clear messages are more persuasive. At the most basic level, clear messages persuade people to act simply because they can easily understand what you want them to do and why. At an advanced level, you can use well-crafted, clear messages to persuade your receivers to accept your point of view or to act on your suggestions.

The bottom line is when your messages are clear, you are more likely to meet your instrumental goals as a communicator. As an added bonus, when your messages are clear, your receivers are more likely to see you as being clear-thinking, logical, and intelligent. Of course, that means you need to take the time while you are creating the message to *be* clear-thinking, logical, and intelligent. This involves paying attention to clarity in three dimensions: the big picture (central idea, bottom line, coherent clustering, logical organization, and stand-alone sense), wording (sentences, word choice), and visual design (formatting).

1. Paula Lentz, “MBA Students’ Workplace Writing: Implications for Business Writing Pedagogy and Workplace Practice.” *Business Communication Quarterly* 76, no. 4 (2013), doi:10.1177/1080569913507479.

CREATE A CLEAR BIG PICTURE

The first step in creating clear messages is to understand and plan the big picture. Because you are goals-oriented and receiver-centric, you should already have an idea of what you want to accomplish and how you should adapt the message for your receiver. In this section, we will consider several tips for building clarity at the big-picture level, including identifying a clear central idea, leading with the bottom-line up front, coherently clustering and logically ordering information, and ensuring stand-alone sense.

Identify the Central Idea

A good business message should advance one clear, central idea. In general, this central idea should be your instrumental goal. So if your instrumental goal is to ask your manager for a raise based on your performance, that request should be the central idea of your message. You may bring up evidence or sub-points, but your message should remain focused on your request for a raise.

Having a central idea is key to effective communication. Particularly with emails, letters, and other correspondence, introducing multiple topics may lead to important information being lost or questions not being answered. If you need to send your boss an update on a project with one client and you need to address a problem with a different client, it would be much clearer to send two separate messages—one for each client. That way, each email can be addressed separately, and the problems with one client won't distract your boss from your success with the other client.

The same principle applies to spoken messages. When you are giving a presentation, you should carefully plan your central idea and then stick to it. Take the time to craft your presentation so that your central idea is clear and is supported by all your slides and your spoken messages. Perhaps the best example of the one clear idea comes through in TED Talks. These talks—which run about 15 minutes long—always intensely focus on a single idea.[1]

In longer, more complicated documents, such as reports or proposals, there are usually several main sections. But even with multiple sections, there should be a single, central idea. Understanding your overall goals and your clear central idea will help you organize the chapters, sections, arguments, points, and sub-points.

Whether your message is short or long, written or spoken, being focused on the central idea will strengthen your message by making it easier for your receivers to understand and to act on.

Lead with the Bottom Line Up Front

In business, you can count on your receivers to be busy people, so you need to respect their time by providing the clearest and most efficient messages you can. Instead of building toward your conclusion and presenting your main idea as a punch line, you should start with what you want your receiver to conclude. Management communication experts Mary Munter and Lynn Hamilton called this approach leading with the "bottom line up front" or "BLUF" for short.[2]

Having a BLUF orients readers to what will come in the message. By starting with conclusion up front, your receiver will be better able to understand the rest of your argument and reasoning.

Writing a BLUF can be as simple as putting your request as the opening statement of your message.

> *Examples:*
> Due to a schedule conflict, we need to reschedule Monday's meeting.

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1. Chris Anderson, the TED curator, explains how limiting your talk to "just one major idea" is the key to great public speaking. Watch the video at https://www.ted.com/talks/chris_anderson_teds_secret_to_great_public_speaking
2. Mary Munter and Lynn Hamilton, *Guide to Managerial Communication: Effective Business Writing and Speaking*, 10th ed. (Boston, MA: Pearson, 2014).

Can you send a status update on the project?
I recommend using Ream Case Co. as our exclusive supplier.

Your Turn: **The Power of a BLUF**

Assume for a moment that you are Geoff Whitmore, a manager at McGregor Co., and just received the message below from one of your employees.

Step 1. Read the message carefully. At the end of each sentence, ask yourself, do I know why I'm getting this message? And what action do I have to take? Put a star by the paragraph when you know for sure what you need to do with this message.

TO:	geoff.whitmore@mcgregor.com
SUBJECT:	McGregor Family Scholarship
DATE:	March 2, 2024

Geoff,

Last February, I applied for and was awarded a McGregor Family scholarship to pay for my MBA, which I was planning to start in August 2022. However, due to a family medical emergency, I was unable to begin the MBA program because I was the primary caregiver for my family member.

At the time, we talked about being able to defer my scholarship for one year without reapplying.

With things settling down at home, I began the process of getting officially enrolled in the MBA program for fall. So I reached out to HR. And that's when I learned that the form that I filed for the deferral was filled out incorrectly. So instead of it getting processed as a deferral, it got put into the system as a cancellation.

I was told that I would need to reapply for the scholarship. But the deadline was yesterday. So it looks like I would have to wait another year to apply.

I know that I should have followed up with HR sooner and that it is ultimately my responsibility that I missed the deadline. But could you please grant me a one-week extension to this deadline so I can submit a full application? Having a McGregor Family scholarship would make a world of difference for me–especially given my family situation.

Thank you very much for considering this request.

Step 2. Now that you know the purpose of this message, write a BLUF in the box at the top of the message.

Questions to Ponder

1. How much time did it take for you to make sense of the message without a BLUF? How much time did it take when you read your BLUF first?

2. In what ways does a BLUF help you understand the message?

3. How might using BLUFs help you achieve your communication goals?

Cluster Information Coherently

Once your BLUF is in place, the next step is to build points and sub-points that support the clear, central idea. The strategy for building points is to cluster information into internally coherent points. **Clustering** refers to the grouping of similar ideas. Internal coherence means that any points and sub-points you make should "stick together." Another way to think of internal coherence is that each point also should be a single idea.

For instance, if you were to write a letter of recommendation, all the things you want to say about your employee's work ethic would be in one point, and all the things about his or her data analytics ability would be in another point. You wouldn't want to mix those ideas together, as that would make your message harder to follow. Follow these tips and tools for clustering information coherently.

Anticipate
The first step is to anticipate what information your receiver needs. If you are making a pitch for new recycling program, your receiver may be particularly interested in information on costs of implementing the program, stories of successes in other similar-sized companies, and information on how much waste your company is producing.

Gather
The next step is to gather as much information as you need. We'll cover evidence strategies in much more depth in Chapter 5. But for now, start with what you already know, then gather more information by consulting publications or searching online. You may also need to gather information from your own insights, analysis, and research (such as customer surveys or market analysis).

Cluster
With all the needed information in hand, it is time to cluster it into internally coherent points. There may be multiple, coherent ways to

organize information. For instance, if you are comparing similar vendors, you might organize your information by company. Or you might organize by sales feature. Test different combinations to find the clusters of information that will be most convincing for your receiver.

A few tools can help you cluster your information. First, you can use the classic outline to cluster your thoughts. The classic outline (sometimes called the Harvard outline) uses roman numerals, numbers, and letters along with indents to group information into main sections, subsections, and details.

Second, you can use a mind map. A mind map visually represents the relationships and hierarchies between different pieces of information. In a mind map, a central point is surrounded by several branches, each of which has branches of its own. The result is more fluid, more visual, and less strictly hierarchical than the classic outline.

Third, you can use a tool called Minto's Pyramid. Communication consultant Barbara Minto designed the pyramid specifically to structure business communication.[3] In the pyramid, you put the main idea (or recommendation) at the top, with a few smaller supporting ideas underneath to support the main idea, and facts, data, and analysis on the bottom to support the whole structure.

Each of these clustering strategies can help you organize your information and arguments in a way that will be most effective for your receiver.

Check

At this point, you need to check for internal coherence by making sure that all the information in each cluster logically fits together. For instance, if you cluster on product affordability, every piece of information in that cluster should deal with prices. Any extraneous information about the product that doesn't deal with affordability needs to be moved into a different cluster.

3. You can learn more at: Barbara Minto, *The Pyramid Principle: Logic in Writing and Thinking*, 3rd rev. ed. (Harlow, UK: Financial Times Prentice Hall, 2009). https://www.barbaraminto.com/

Write
Finally, write each cluster as a short and focused paragraph. You may have been taught in school that a paragraph must be at least three sentences long. In business communication, however, the danger is more often that paragraphs are too long. Sometimes paragraphs can be as short as a single, clear sentence that makes a simple point.

Order Points Logically

Logical ordering refers to sequencing your points so that your receiver can see connections between your ideas and follow the progression of your message with ease. When information is presented out of logical order, it may become difficult to follow the message, or the message may feel "inside out" to your receiver. You want to avoid this problem by logically ordering your points.

In business communication, there is not a single right way to logically order points. Instead, the most logical organization depends on what you are trying to accomplish. Consider these commonly used organizational patterns and the examples of different messages that fit best with each pattern.

Problem-Solution
The problem-solution organization presents a problem followed by a solution (or several solutions) to that problem. This organization works well in business proposals, advertising, and sales, where the goal is to persuade the receiver of the value of the product or service being offered. It also works well in internal proposals for things such as recommending new processes.

Cause-Effect
This pattern shows how specific actions lead to specific results. Cause-effect organization works well for status reports that offer an explanation of why an effort succeeded or failed. This organizational pattern—especially if presented in an "If/Then" approach, also works well for supporting predictions or recommendations.

Chronological
In this organizational pattern, you order points as they occur in time sequence. This pattern is effective for recounting a timeline of events or providing a sequence of steps your receiver will have to follow.

Spatial
To create a spatial organization, you order points to reflect their relationship in physical space. This organization can include things like top-to-bottom, left-to-right, west-to-east, etc. This kind of organization can be helpful for delivering sales territory status reports or describing a proposal for a website redesign.

Topical
In this approach, you order points by subject or topic. The topics are all related to the main idea, but there is no inherent logic to how they should be sequenced. For instance, if you were comparing vehicles to purchase, you might organize points around price, maintenance and repair costs, options, and style. Even though those points could be presented in any order, leading with your strongest points is usually a more effective approach.

For all organizational patterns, make sure that your points and organizational logic support your clear central idea. If there are too many points, or if the message is too complex, consider separating it into smaller, more focused messages.

Test Your Message for Stand-Alone Sense

The final element of big picture clarity is making sure your message has *stand-alone sense*. Stand-alone sense means that there is enough information in the message you're your receivers can understand it even if they have no additional information or context. Ask yourself the following two questions to determine if your message passes the test.

First: If people completely unfamiliar with the situation read this message, will they understand it? (If it is a high-stakes message, you might even have someone unfamiliar with the situation read it.) If you have written your message clearly, your receiver should have no need to track down additional information or ask questions to understand your message. If additional information or context is needed (another message, previous conversations, or other shared knowledge), you will need to provide that context within your message.

Second: If I find this message several years from now, will I understand it and have all the information I need? The reason for this question is that a written message should make just as much sense whether it is read today, tomorrow, or years from now. If a message requires the receiver to remember names, dates, details, information, or conversations that are not included in the message, then it cannot stand alone. You should go back and enter the missing pieces.

One tip for making sure your message has stand-alone sense from the beginning is to ask and answer the “5 Ws and H” in your message. That means asking Who, What, Where, When, Why, and How. If answers to any of those questions are relevant to your clear, central idea, make sure you include that information in your message.

WRITE CLEARLY AT THE DETAIL LEVEL

Now that you've got a clear big picture, it is time to fill in the details. Even small details can make or break the clarity of your message. Consider the following tips for ensuring your sentence composition and word choice add to the overall clarity of your message.

Compose Clear Sentences

Each sentence in a business message should contribute to your overall message and help you reach your goals. There are many rules and strategies for composing clear sentences. Here are some of the most helpful for business.

Write Short Sentences

The shorter a sentence is, the easier it is to understand. Of course there will be times that you will need to write long sentences. But if you can find ways to rewrite one long sentence into two or three short and clear sentences, your message will be much clearer.

Use Active Voice

Active voice is also clearer than passive voice. This means that you make clear who or what is performing the action and what action was performed.

> ***Passive Voice:*** "The package was delivered by Bill."
>
> ***Active Voice:*** "Bill delivered the package."

Active voice is not a hard and fast rule, however. Passive voice can be effective in communicating an action when you don't know (or don't want to emphasize) who performed the action (for example, “The package was delivered” keeps the focus on the package).

Use Proper Grammar and Punctuation

Paying attention to the smallest details of your message will also help the overall clarity. Following grammar and punctuation rules may seem nitpicky and unnecessary. However, those rules provide clarity because they help establish shared meaning. Failure to follow grammar and punctuation rules can lead to confusion, misunderstandings, or incorrect actions.

Consider the Ohio woman who got out of paying a parking ticket for parking her pickup truck overnight in a no-parking zone. She successfully argued that she shouldn’t be fined because the sign said there was no parking for “any motor vehicle camper, trailer, farm implement and/or non-motorized vehicle,” and her truck was not a “motor vehicle camper.”[1] The missing comma between *motor vehicle* and *camper* cost the police department the price of a ticket. In your business messages, missing or incorrect punctuation or unclear grammar can cost you time and money if your receivers misunderstand your message.

Use Parallel Structure

Parallel structure also can add to clarity. Parallelism can provide your receiver with cues to understanding how the different points in your message relate to each other. For instance, you might start three consecutive paragraphs by writing the first sentence of each one in a similar way: “Product X is reliable”; “Product X is versatile”; and “Product X is stylish.”

Make Direct Requests

When you want your receiver to take a specific action, make that request both clear and direct. So instead of writing “Would you please send the parking pass back at your earliest convenience?” you could write “Please return your expired parking pass by February 1.” Many times the best direct requests use the imperative mood, which cuts out the noun and gets straight to the action you want the receiver to take.

Communication Tip: **Signal Content with a Descriptive Subject Line**

The subject line has been described as the "most valuable piece of inbox real estate."[1] Email subject lines serve two vitally important processes. First, they help receivers prioritize how to work through their inboxes. Given the average U.S. businessperson receives dozens of legitimate emails per day, chances are, they are scanning their subject lines to determine which messages need immediate attention and which can wait. Second, subject lines help receivers retrieve important messages at a later date.

Therefore, it is important to know how to write a descriptive subject line. Here are a few tips:

Use the subject line
You may find it surprising, but some people do not use subject lines. Not only is this a waste of valuable inbox real estate, but a blank subject line also increases the likelihood of your message going to Junk Mail.

Keep it short
The subject line is not the place to write your entire message. Include only enough words (~4-8) that your receiver can anticipate what is in the message.

1. Even though we cannot track down the original person who said this, many professional communication bloggers and marketing consultants faithfully repeat this adage.

Signal whether action is necessary
Some messages you send will be informational and others will be requests for action. If you can signal which is which, your receiver will be able to respond more quickly. For instance, saying "Approval Needed – Revised Project Budget" signals a requested action. In contrast, "Revised Project Budget" could be interpreted to be an informational update.

Include critical information
If you need to share a critical piece of simple information, help your receiver by putting that in the subject line. For instance, instead of "Marketing Meeting update," you might say "Marketing Meeting moved to Room 201."

Use key words that are meaningful to your receiver
Think about how your receiver would look for your message in the future and make sure to include those phrases. For instance, instead of "Project Update," your receiver might find it more useful to have "Bluestone Bakery & Café Project Update."

Spell correctly
If you have a typo in your subject line, your message may be lost forever. For instance, if you spell "Bluestone" as "Bluestnoe" and that message gets filed away, the automatic search function will never find the message.

Choose Clear Words

When you are writing clear messages, word choice matters. As a business communicator, your job is to make sure that each word you choose means what you want it to mean and that your receiver will understand it correctly. Therefore, the most important aspect of clear wording is choosing your words with your receiver in mind. Here are several ways to avoid potential pitfalls of unclear wording.

Define Terms

If you use a term that your receiver may not know, include a definition, example, or other kind of explanation. Without a definition, you are putting a burden on your receiver to look it up or risking that your receiver will not understand your message.

Explain Acronyms

If you use an acronym, on its first appearance in your message spell out the full name and put the acronym in parentheses immediately following it. For instance, "The Marketing Task Force (MTF) has been assigned…" At that point you can use the acronym exclusively.

Avoid Jargon

Try to avoid jargon. Of course, some jargon will be impossible to avoid, especially in internal business communication. But the more you can use terms that all your receivers will understand, the clearer your message will be.

Use Simple Words

Shorter and more familiar words tend to be clearer than longer or more unusual words. Consider this example: "Pertaining to our discussion of yesterday, it would be advantageous to allocate additional resources until we reach the optimum parameters." While all of those words are English, the meaning of the sentence as a whole can be lost in the length and complexity of the words.

Use Precise Words

Choose words that are as precise as needed to get your point across. Sometimes a very basic term will work, such as when you point someone to the "red" rental car. Other times, much more precision is necessary. There is a big difference between saying, “We *have not* reimbursed employees for tuition” and “We *do not* reimburse employees for tuition.” That one small word can dramatically change the meaning of the message and could generate much confusion.

Clarify Ambiguity

Ambiguity occurs when a string of words could reasonably mean different things. For instance, scheduling a meeting at 6 o’clock could mean 6 a.m. or 6 p.m. Or it could mean 6 in New York, 6 in Santa Clara, or 6 in Tokyo. Other times, an ambiguous term can lead to even more disastrous results.

Fix Vague Referents

A vague referent occurs when you substituted a noun with a pronoun, but it is not clear what noun your pronoun is supposed to represent. Some of the words to look out for are He, She, They, It, This, That, These, Those. When you have a sentence with any of those words, take a closer look. If it isn’t completely clear what the referent is referring to, fix it by putting the noun back in.

FORMAT FOR HIGH SKIM VALUE

One thing to remember about business messages is that there's a good chance no one wants to read what you write. Your receivers will want to get the main points and action items as quickly as possible while reading as few words as possible. You can improve the clarity by striving to create a message with what business communication experts Mary Munter and Lynn Hamilton call *High Skim Value*.[1] High Skim Value refers to the ability of your receiver to glean the central message and key pieces of information just by skimming.

The good news is that you do not need to be a graphic designer to create professional documents with High Skim Value. All you need is to master a few basic formatting options available in most email and word processing programs. Clear headings and discrete paragraphs divide information into easily understood chunks. Bulleted or numbered lists help to identify key details. Bold and italic fonts help to highlight important dates or action items. The basic formatting functions that follow can help any business person look like a pro.

Use White Space to Increase Readability

White space refers to any unused part of the page. It includes margins around the edge, spaces between lines, and other unused space. The purpose of white space is that it eases the visual burden on the receiver. In fact, a document with judicious use of white space can be less daunting to read than the exact content communicated without white space. Here are some general rules for using white space.

1. Mary Munter and Lynn Hamilton, *Guide to Managerial Communication: Effective Business Writing and Speaking*, 10th ed. (Boston, MA: Pearson, 2014).

Margins

Generally, margins should be set to at least 1" around the entire page. If you know a report may be printed and bound in hardcopy format, you should leave a wider margin on the edge where it will be bound. In more complex documents, you can increase the margin of particular sections (that is, add additional white space) to show they are subordinated to higher-level points.

Line Spacing

In business documents, you often will see paragraphs with extra blank (white) space in between. Formatting paragraphs in this way make documents much easier to read and skim than if they were spaced the same way—either single-spaced or double-spaced throughout. That is because the white space helps to visually "separate" paragraphs from one another.

You may want to check your computer settings. Some software programs now default to a multiple line spacing and automatically add extra space in between lines. This default is problematic because too much line spacing also can make your documents harder to read. We recommend resetting your defaults to single space with no automatic extra spacing before and/or after paragraphs.

Text Justification

Most of the time in business you will see documents that are left aligned, which leaves a jagged edge of text on the right. Other times you may see text that is justified (or "fully justified"), where both the right and left sides are perfectly straight lines. While justification gives documents a clean appearance, it can make them much harder to read. The jagged edge on the right helps your receiver's eyes move from the end of the right edge to the start of the left edge. Another concern with justification is that it can put gaps in words or between words that make them harder to read. For these reasons, left aligned text is preferable most of the time.

Use Headings to Indicate Flow

Headings can be helpful for increasing skim value. These short phrases (or sometimes complete sentences) can signal new major points. If headings are done correctly, your receiver should be able to read only the headings within your message and clearly understand your overall basic message. Try reading the headings in the chapters in this book. Are you able to get the big picture at a glance? Here are some tips for writing good headings.

Placement and Number

Strategically mark major new ideas with headings and subheadings. Think about headings as marking "chapters" in your document. But be careful of heading overload. Having too many headings can be just as bad for skim value as having too few headings. Yes, there may be times when a section may have only one paragraph in it. But if you write a message and every paragraph has its own heading, then you're in heading overload territory. As a general rule, try to stick to fewer than three headings per full page of text.

Wording

The wording of headings is important. Your heading should be worded clearly enough that your receiver will understand the essence of that section. Sometimes with only a few extra words, you can create a much more skimmable document. For example, instead of using the heading "First Quarter Sales Figures," use the more specific "First Quarter Sales Rose by 18%"

Formatting

When it comes to formatting headings, simplicity is always good. One of the easiest ways to format headings is to write the heading on its own line and put it in bold text. This approach works well for long emails or letters that have multiple sections. Another approach is to set off the heading in a different color and font face. This more visual approach is best for more formal reports.

However you decide to format headings, consistency will be key. For instance, if you have two levels of headings (i.e., a top level heading and a subheading), all of the top level headings should be formatted alike and all the subheadings should be formatted alike. Additionally, you should try to visually signal which level is higher. For instance, your higher level heading might have title case (where each main word is capitalized) and your lower level heading might have sentence case (where only the first word of the heading is capitalized).

Select Fonts to Draw Attention

Font emphasis is another way to increase skim value. Any type of formatting you add will draw your receiver's attention. This can include elements like font face, size, and color, as well as emphasis like underlining, bold, and italic effects.

Here are some guidelines for effective use of fonts.

Font Faces

Even in extended business reports, use no more than two font faces per document—one for the main text and one for headings. A common font combination is to use a **serif** font (like Times New Roman) for the body of the text and a **sans serif** font (like Arial) for headings.

Color

Like font faces, color should be simple as well. For most reports, one color for text (black or dark grey) and one color for headings is usually plenty of color. Dark colors tend to work better than light colors, especially when you're using colors for headings. But you might want to pay attention to your color palette and choose colors that are meaningful to your receiver and appropriate to the subject, such as using green for a report on sustainability or your company colors for a report on your quarterly performance.

Size

There are a number of font styles that can be applied to draw attention.

Font Styles

There are a number of font styles that can be applied to draw attention.

> **Bold**
> Bold font styling is easy to spot on a page or screen and likely will immediately draw your receiver's attention. In addition to highlighting headings, it can be used to emphasize anything you don't want your receiver to miss. Key information like deadlines, tasks, or changes might be good candidates for bold font styling.
>
> **Underlining**
> Years ago when documents were prepared on typewriters, underlining was a common way of adding emphasis. And certainly, some people still use underlining as their go-to technique. However, with the advent of the Internet and hyperlinks, underlining now signals a hyperlink. So if you are sending a message—especially one that might be read on a computer screen—choose a different form of text emphasis so your receivers don't think you have a broken hyperlink in your message.
>
> **Italics**
> Italic font styling is not very easy to spot. So it usually is used to draw attention to a particular word or phrase to signal its relative importance. For instance you might thank someone *very* much (emphasizing "very") or

Keep it Simple

If there are too many elements vying for attention, your receiver may get visually overwhelmed and will no longer know where to look. Instead of speeding up the time it takes to skim your message, the ensuing chaos can dramatically slow down and perhaps halt all progress.

Therefore, if you remember one thing about creating High Skim Value, it should be this: Less is more. While you should not be afraid to use various formatting elements to draw attention, you do need to be careful not to use too much emphasis.

For instance, you only need a few styles applied to make a piece of text pop out. For instance, a heading in a different font face and a bright color will draw in your receiver's full attention. You do not also need to make it bigger, bold, underlined, italicized, and written in all CAPS.

PUTTING IT INTO PRACTICE

Being clear is a critical part of business communication. In order to accomplish work with your receiver, your receiver needs a clear understanding of the information you are communicating and the actions you are requesting.

Now that you've learned the basics of how to compose a clear message—from the big picture, to the nitty-gritty details, to the overall visual appearance, you are ready to begin practicing and applying the clear competency. In this section, you will learn and practice presenting information clearly in a variety of "people management" messages that document agreements, personnel matters, and sexual harassment.

Message Strategy: Documenting Personnel Decisions

Documenting important decisions and activities is good business practice. By documenting, you provide a retrievable record that can be used by yourself and others. It can help you accurately recall details. It can help others in your organization access institutional knowledge that would otherwise be dependent upon your memory (and dependent on them knowing that you are the person who might remember). It can even help you settle minor disputes that arise from conflicting memories of events.

Business professionals document a wide variety of activities: standard procedures, policy changes, client consultations, departmental decisions, and personnel actions. Here are some specific strategies for documenting personnel actions clearly.

Some of the easiest kinds of personnel actions that must be documented are personnel decisions. When job candidates are hired, they should receive a formal offer letter; if they are not hired, they should receive a polite rejection letter. If employees negotiate a raise or an extra week of vacation or flexible work arrangements, those decisions should be documented, too.

These basic strategies will help you as you document personnel decisions:

Include All Relevant Information

Identify the who, what, where, when, why, and how. Anticipate questions your receiver may have and answer them. Also, be precise in your explanation and clarify any foreseeable ambiguity. For example, is a bonus payment for taking on an additional assignment a lump-sum payment? Or will it be distributed across several pay periods?

Keep the Tone Professional and Positive

Documentation of personnel issues can sometimes be forwarded to multiple parties beyond the primary receiver (employees, their supervisors and unit managers, administrative assistants, and human resources). Be sure you are representing yourself and your organization well.

File Your Message for Easy Retrieval

Documentation isn't helpful if you and others can't find it. If your documentation will be sent via email, write an intuitive subject line that will make it easily searchable by you and your receiver. If the documentation will be private and reside as a document saved to your computer, give it an easily searchable file name, use the properties function of your word processing program to set searchable keywords or tags, and save it in a folder that will be easy and logical to find. If you will place the documentation in a hardcopy file (such as a personnel file kept in the Human Resources office), format the documentation with high skim value so that people leafing through multiple sheets of paper can easily spot your message. Also include the date it was prepared (it won't be automatically date-stamped like an email will be) and note cross-references to any supporting files, whether electronic or hard copy.

The following is a sample message a manager might send to an employee after they negotiated tuition reimbursement. Note that the message clearly documents that the request was approved and articulates the conditions of the approval. At any point in the future, if there is confusion about whether a reimbursement payment should be made or denied, the manager could return to this message.

MANAGER'S DOCUMENTATION OF DECISION

TO:	dante.spurlock@mcgregor.com
SUBJECT:	Approval of Tuition Reimbursement Request
CC:	HRDepartment@mcgregor.com

D'Ante,

We are pleased to approve your request for reimbursement of tuition for the MBA program at City University. Below are the conditions of the reimbursement.

- We will reimburse tuition and fees on a semester-by-semester basis, up to $10,000 per semester, and up to $40,000 total.
- You must earn a 3.0 GPA to be reimbursed for the full amount. For any grade of C+ or lower, we will prorate your reimbursement accordingly (e.g., a semester with 3 A/B grades and 1 C/D/F grade will be reimbursed only up to 75%).
- Tuition reimbursement is contingent upon your remaining a full-time employee in good standing at McGregor & Co.

Additionally, we will accommodate your course schedule by guaranteeing release time by 5 p.m. on evenings when class is scheduled. Please provide your manager with your class schedule at least one month in advance. Also, please work closely with your manager to make arrangements to cover work in your absence.

Congratulations, again, on your acceptance to the MBA program at City University.

Best of luck,

Mike

Michael F. Williams | Manager
McGregor & Co.
12345 Main Street
Hometown, KY 40292

In a perfect world, managers would always follow best practices for documenting decisions. But in the real world, there are times when they don't. If you are an employee and you negotiate a documentable outcome, but your manager does not send you proper documentation, you should follow-up with your own message.

EMPLOYEE'S DOCUMENTATION OF DECISION

TO:	michael.williams@mcgregor.com
SUBJECT:	Follow-Up on Request for Tuition Reimbursement

Mike,

Thank you for talking with on Monday about my plans to pursue an MBA at City University. I cannot begin to tell you how appreciative I am of the support you and McGregor & Co. are providing. It really means the world to me. I am writing now to confirm my understanding of our agreement.

At our meeting, you said that McGregor & Co. will reimburse me $40,000 for tuition as long as I maintain a 3.0 GPA. The tuition reimbursement will be payable in four installments ($10,000 per semester), and I will file all paperwork with the HR department.

Also, I will have permission to leave by 5 p.m. on evenings when I have classes.

Please let me know if there is anything I missed or that needs further clarification.

And again, thank you for your support of my MBA journey.

Best,

D'Ante

D'Ante Spurlock | Business Analyst
McGregor & Co.
12345 Main Street
Hometown, KY 40292

Message Strategy: Documenting Employee Performance

Another kind of documentation that managers often write deals with employee performance issues. Documenting performance issues leaves a critical “paper trail” that can be used to support future action.

Consider this scenario. One of your employees, Cameron, is chronically late to work. Cameron’s tardiness is causing multiple problems across the unit. Meetings are starting late, early morning customer calls are going unanswered, and his team is getting frustrated.

As his manager, you talked privately with Cameron about his performance. In your conversation, he agreed to do better.[1] Cameron did do better—for a couple weeks. Then he started showing up late again. You talked to him again, this time more sternly. Yet, the pattern repeated. He was on time for a couple weeks and then chronically tardy once again.

If you documented each of these conversations, you would have an important record of Cameron’s performance. You might use these messages for your own recall: When did you talk to him last? What exactly did you agree to? And that information could help you in your ongoing conversations with Cameron. If you decide to put Cameron on probation or fire him because he is too unreliable, you might need these messages to support your decision. If you leave your position, this documentation will provide the incoming manager with a clear record of Cameron’s past performance.

Here are some strategies for documenting employee performance issues:

Strike a Constructive Tone

Given your instrumental goals (getting your employee to change a behavior) and relational goals (maintaining a positive working relationship), harshness won’t serve you well—at least in early feedback. Be polite and emphasize the positive instead of focusing on the negative.

Clearly State Your Expectations

If you want real behavioral change, then you have to let your employees know exactly what your expectations are. Agreeing that an employee will "do better" is not very clear. Providing a precise (and measurable, if possible) standard is much better.

Clearly Document Supporting Information Separately

Even though your message to your employee is constructively framed, you still need to retain full details in case performance does not improve. A separate, privately held document can hold a host of details and impressions that can be used for future reference.

Here is an example of message you could send to Cameron following the meeting.

CLEAR, CONSTRUCTIVE DOCUMENTATION TO EMPLOYEE

TO:	cameron.hansen@mcgregor.com
SUBJECT:	Improving Punctuality

Cameron,

I am writing to follow-up on our meeting this morning where we discussed your recent attendance record and the importance of being on time for work.

To recap the outcome of our meeting, you committed to be at your desk and ready to go by your scheduled start time of 8:30 a.m. Should there be any extenuating circumstance that prevents you from being on time, you have agreed to send me a text alert prior to 8:30.

I appreciate your willingness to develop your time management skills and to commit to being on time for work from this point forward. I look forward to our check-in meeting on October 25.

Marissa

Marissa Tanis | Team Leader
McGregor & Co.
12345 Main Street
Hometown, KY 40292

Often it is helpful to record some "unedited" private notes that includes additional information about the encounter. Here is an example of private documentation that will be filed away in case another performance meeting is warranted. Notes can be typed or handwritten. But they should be somewhere that is easily searchable.

CLEAR, PRIVATE DOCUMENTATION NOT TO BE SHARED

October 11, 2024

I monitored Cameron Hansen's attendance this week (Oct 7 – 11). He was late every day:

Monday	Tuesday	Wednesday	Thursday	Friday
10 minutes	5 minutes	20 minutes	15 minutes	10 minutes

I called Cameron into my office this morning to discuss his tardiness. I explained the negative impact it was having on his and his team's performance.

At first, Cameron attempted to minimize the problem saying he doesn't remember being late, but if he was, "it was only once and only by a couple minutes." I showed him my record to remind him of his recent performance.

Cameron said that there weren't any specific obstacles for him getting to work on time. The problem appears to stem from time management issues. He promised to do better, and I offered him some time management strategies.

We scheduled a "check-in" meeting in two weeks (10/25). I emailed a follow-up note to Cameron.

Message Strategy: Reporting Improper or Illegal Behavior

Nearly every day in the news there is at least one story about people behaving badly at work. Stories abound about people embezzling money from their company, defrauding customers, and sexually harassing or assaulting coworkers. Because improper behavior raises questions of leader effectiveness, exposes organizations to lawsuits, and jeopardizes the organization's reputation with the community, stakes are high.

Therefore, if one of your employees is accused of improper behavior—or if you are accusing someone else in the organization of improper behavior—it is vital that you clearly document the facts. The documentation will help you remember specific details and it may serve as an official record whether in company decision-making or legal action.

Here is some advice for documenting improper behavior:

Be Brave

Sometimes documenting organizational wrongdoing or improper behavior can be emotionally difficult. If the wrong-doer is a powerful person in the company, a beloved public figure or community leader, or even someone you consider a friend, it raises the stakes considerably, as you may risk professional or personal retaliation. Other times, the improper behavior itself can be difficult or embarrassing to talk about—such as sexual harassment or assault. If you cannot muster enough bravery on your own, find an ally or mentor in your organization who can encourage you to speak up.

Seek Professional Guidance

If you face a serious personnel behavior problem, contact professionals to help you navigate what to do and what to document. Senior leadership, the human resources department, and legal counsel are great places to start. They also are good resources for reviewing your documentation before you share the message with others.

Be Precise

In high stakes communication, there is little, if any, room for ambiguity or imprecise language. Make absolute sure that you are reporting all details accurately. Use full names in documentation. Instead of saying "about two weeks ago," identify the exact date. If you are reporting what someone told you and not something you personally witnessed, then be clear about that as well. Instead of saying, "Amy sent a threatening text message to Bryce," say "Bryce reported to me that Amy sent him a threatening text message." The difference is subtle, but important. In the first message, you are personally evaluating the tone of the message. In the second, you are stating a fact without passing judgment. The precision will important, especially if you ever have to testify in an internal investigation or a legal procedure.

Take a Neutral Position

Especially when there are legal issues involved in a case, make sure that you are not acting as a judge and jury. Present your facts in the most unbiased way possible. One way you can check for bias is to remove adjectives and adverbs. You might also use less descriptive verbs. These word choices tend to create a more biased account. Consider the difference between, "Joe spitefully snapped that…" and "Joe replied that…"

Here we provide an example of how you might document an employee's claim of sexual harassment.

EXAMPLE OF INTERNAL REPORT OF SEXUAL HARASSMENT ACCUSATION

TO:	hector.lopez@mcgregor.com
SUBJECT:	Report of Sexual Harassment

Hector,

This morning, one of my employees, Karan Blake, has accused another employee, Gerald Hoffer, of sexual harassment. Below is a summary of the accusation.

Karan came to my office at approximately 9:15. She reported to me that she is being sexually harassed by Gerry. Karan appeared visibly upset. She cried during the meeting and repeatedly said that she is “afraid of Gerry.”

She said that she and Gerry had gone on two dates together last month. But after the second date, she was no longer interested in seeing him romantically. Karan said that she told Gerry that she did not want to go out again, but that Gerry “won’t take no for an answer.” She also said that she has been very clear in asking Gerry to stop contacting her.

Karan said that she has received flowers delivered to the office that she suspects are from Gerry. She gave them to the receptionist. She also said that Gerry sent more than 20 text messages to her yesterday, the last of which was an “inappropriate picture.” She did not offer to show me the texts, nor I did not request to see them. Karan reported that she has since then blocked Gerry’s number.

At that point in the meeting, I reassured Karan that we take accusations of sexual harassment very seriously at McGregor & Co. I informed her that I would be reporting this issue to Human Resources for further action and that someone from HR would be getting back to her shortly with next steps.

Immediately following our meeting, I phoned you at 9:40 a.m. to inquire about the appropriate course of action. That is when you asked me to send an email recapping my conversation with Karan. I also understand that you will be handling the case from this point and that if anyone attempts to discuss the case with me (Karan, Gerry, or anyone else), that I will stop the conversation and refer them directly to you.

Please let me know if there is any additional information you need from me.

Thank you for your help,

Marissa

Marissa Tanis | Team Leader
McGregor & Co.
12345 Main Street
Hometown, KY 40292

CHAPTER 4: CONCISE

Learning Objectives

By the end of the chapter, you will be able to:

- Explain why it is important to be concise
- Describe why being concise is not *only* about being brief
- Identify extraneous information and explain strategies for shortening the message without losing critical information
- Apply several techniques for reducing wordiness at the sentence level

You also will learn message design strategies for:

- Preparing executive summaries
- Taking meeting minutes

INTRODUCTION TO CONCISE

Delivering Complete Messages as Efficiently as Possible

Perhaps you've heard the old adage, "time is money." When it comes to doing business, that certainly is true. And business professionals don't want to waste any of either one. Instead, they want to be efficient as possible, using the minimum amount of resources needed to complete the job at hand. They want to manufacture quality products without wasting raw materials. They want to provide excellent customer service without scheduling too many employees for a shift. They certainly want to communicate effectively without wasting time speaking, writing, reading, or listening to more words than necessary.

Whether it is email, presentations, reports, or any other kind of message, business professionals prefer shorter to longer. In fact, many professionals are quick to admit they won't read any email that requires them to scroll down. Hiring managers will stop reading cover letters that are too long. Some executives forbid their management team from presenting more than one slide at meetings. When one of our colleagues was in his first professional job, he left a voicemail message for his boss that was so long that he got cut off and had to call back to finish his message. The boss threatened to fire him if he ever again left a message long enough to get cut off by a beep. (He never did.)

Impatience with long messages underscores the importance of not wasting time—and not wasting words. But it's not just impatience. Business consultant Joseph McCormack identifies chronic information overload, shrinking attention spans, and a glut of daily interruptions as key drivers for being more concise in all our communication.[1] Business professionals simply don't have the time or mental energy to attend to long messages.

For these reasons, competent business communicators strive to be concise. Concise refers to the ability to present complete messages as efficiently as possible. As a result, concise message are faster for receivers to process and act upon and that is good for business. In this chapter, you will learn strategies for communicating more concisely.

1. You can read more here: Joseph McCormack, *Brief: Make a Bigger Impact by Saying Less* (Hoboken, NJ: Wiley, 2014).

BE BRIEF AND COMPLETE

Before you start slashing paragraphs out of your written messages and slides out of your presentations, let's pause for a moment to clear up a common misconception. Although the word *concise* is usually interpreted as simply meaning short or brief, a more accurate definition is "brief *and* complete." Both are necessary to be effective.

It's easy to see why complete messages that are too long are a waste of valuable time. But brief messages that are incomplete can be just as problematic. If you compose a message that has few words, but doesn't have all the information your receivers need, it will take longer for them to take action or reach a decision. They may spend unnecessary time figuring out what information is missing, reaching out to you (and possibly others) to request clarification, and doing research on their own, all of which slows down progress. Other times, they may simply push your issue aside and work on other matters for which they do have complete information, which stops progress. Even more troubling, if you leave out essential information that goes undetected, they may ultimately take the wrong action or make bad decisions, which reverses progress.

So you can see that sacrificing completeness for the sake of brevity isn't going to get the job done. As a communicator who is sending *effective* messages, you will need to include as many words as necessary to make the message complete, but no more. It takes a set of special skills to present that information in as few words as possible.

There are two major sets of strategies that you can practice to become a more concise communicator. The first set of strategies deals with strategically selecting content. The second set deals with reducing wordiness.

STRATEGICALLY SELECT CONTENT

As you strive to make your messages more concise, the biggest impact you can have is strategically selecting content. To be strategic, you must make determinations about content with both your goals and your receivers in mind. At all times, you need to ask yourself two questions: “Does this message give my receivers all the information they need to act on my message?” and “Does this message contain any extraneous information they don’t need?”

A recent sales meeting we attended illustrates a poor balance to those questions. We had scheduled a 45-minute meeting between key decision makers and a technology supply company. When the sales presentation began, the speaker spent a much of the time providing an overview of four distinct product lines one-by-one. He shared minute details about the products (like what colors they came in) and told us stories about different organizations that use their products. Then with less than 15 minutes remaining, he started telling us about the fourth product line—the one that is specifically designed for higher education applications and the only one we were interested in.

But by then, he had run out of time and used up all our patience. He couldn’t introduce us to all the higher education products we may have wanted to purchase. He couldn’t inquire about our needs and direct us to targeted solutions. He couldn’t describe how his products were better than his competitors. Had he strategically cut out the information we didn’t need, he would have had ample time to cover the information we did need to act on the message. In short, instead of making a sale, he made a bad impression.

So don’t follow this ineffective salesperson’s lead. Instead, follow these strategies to craft concise messages that enable you to achieve your communication goals.

Include Information Your Receiver Needs

In order to write a complete message, you must ensure your receivers have all of the information they need to respond to your message or take action. Understanding your receivers and how they will use your message is essential to deciding the right kind and amount of information to include.

Even on the same basic topic, different receivers have different needs for information. For instance, assume that you are announcing the launch of a new app. Top-level leaders in the company might need information to persuade investors to make a bigger investment. In that case, you should provide information on what the app is, when it will launch, and how it's projected to impact sales. The sales team might need the information to sell the product to customers. So you should emphasize the app features and how they differ from competitors' apps or other apps you built in the past. You might need specific details from your development team to ensure that the launch will go off without a hitch. So your message to them may include more questions than answers: Are all the bugs fixed? Are all our ads ready to go? Are there any last-minute problems that need to be addressed?

In addition to your immediate goals, also remember to consider any future use that your receiver may have for your message. Whereas many messages will never get referred to again, others may be accessed at some point in the future. If your message is recording important decisions, sequences of events, or other activities, make sure to include details your receiver will need to know in the future. Refer to the section in Chapter 3 on "stand-alone sense" for help.

Finally, test your message for completeness. For shorter messages, or those messages with lower stakes, you can simply review the message yourself. Put yourself in the position of your receiver, critically read through your message, and look for any missing pieces of information. Or you might look for specific answers to the 5 Ws and H: who, what, where, when, why, and how. For longer or higher-stakes messages, consider asking someone else to review the message for completeness. Being less familiar with a message helps people spot missing information more easily.

Cut Information Your Receiver Doesn't Need

To write a concise message, you must eliminate any information your receiver doesn't need. This is the step where you can make the biggest difference in terms of crafting briefer messages. Ideally, you'd plan ahead and wouldn't write anything unnecessary in the first place. But oftentimes, you'll find that you've ultimately included something extraneous. That's when you'll have the tough job of deleting it, no matter how long it took you to draft it.

There are several typical culprits of extraneous information: information that is relevant to you, but not your receiver; too much detail when only the big picture is needed; multiple facets of a topic when the receiver is interested in only one facet; and topics that are only tangentially related (or even worse, not related at all). Here are some places where you can cut extraneous information.

Cut Information That Is Irrelevant to Your Receiver

Just because information is highly relevant to one individual doesn't mean that it is relevant to your receiver. You must ask yourself, Does my receiver care? And if the answer is no, then cut the information.

Consider the case of a job candidate who needs to submit an expense report to cover incidental expenses that the company promised to reimburse. The administrative specialist who is handling the reimbursement cares about internal processes, policies, and specific computer systems. The candidate cares about the steps that need to be completed to file an expense report.

> *Extraneous Content:* After I get your receipts, I will create a profile for you in our new Rapid Reimbursement™ computer system, which we implemented only three months ago. Then I will enter your receipts and categorize each expense. At that point, I will submit a workflow request that routes the report to Mr. Xie, the manager who interviewed you, and then Ms. D'Angelo, Accounting Manager, who is responsible for approving all reimbursement requests. Once all approvals are in, it will take 3-5 business days for a check to be cut and mailed to you.

> ***Concise:*** As soon as I get your receipts, I will process your expense reimbursement immediately. We will mail a check to you within 7 business days.

Delete Warm-up Information

Sometimes you might struggle with how to start a message, especially if it is a high-stakes message. If you don't have exactly the right words—and sometimes if you don't know the answer—you may start by freewriting the ideas on your mind. While this can be an effective strategy to get started writing, it rarely adds anything the receiver needs to act on the message. So just remember to delete that freewriting "warm up information" before you send the message.

> ***Extraneous Content:*** You had asked that we all respond to this message with an idea for making the department greener. I thought about it for a long time and considered several options. Some of the ideas seemed really good at first, but weren't very feasible. After much deliberation, I finally decided to recommend putting mixed-stream recycling bins on every floor.

> ***Concise:*** My idea for making the department greener is putting mixed-stream recycling bins on every floor.

Remove Think-Out-Loud Information

There will be times when you are writing when you will think not only about *how* to write something, but also about *what* you are writing. Maybe you are thinking about changing your position (Is this the best use of our limited funds?). Maybe you need to gather better support (I wonder if there is a more current market report available). Maybe you need to confirm facts before communicating them (I should double-check with our contractor on the timeline).

When this happens, you may be tempted to put these "think-out-loud" questions or ideas into your messages. Sometimes there might be good reasons to do so, such as if you want to seek input from your receiver. But if you can get answers to your questions and then revise your message to incorporate those answers *before* sending it, you are bound to write far more concisely.

Extraneous Content: [Message 1, Before calling Amelia] We will meet on Tuesday at 11 a.m., assuming Amelia Hamilton from HR can attend then. If she can't, our alternative times are Tuesday at 2 p.m. and Wednesday at 9 a.m. I will call Jenny to confirm the day and time. In the meantime, please review the candidates' materials and rank your top three.

Less Extraneous Content: [Message 2, After calling Amelia] I have now heard back from Amelia Hamilton in HR. The only time she had available is Wednesday at 9 a.m. We will meet then.

Concise: Our next meeting will be Wednesday at 9:00 a.m. Amelia Hamilton from HR will join us. Please review the candidates' materials and rank your top three.

Replace Detail with a Summary

Having too much detail can make your messages unnecessarily long. To make your message more concise, ask yourself how much detail your receiver needs. If your receiver only needs the big picture, then replace the detail with a summary instead.

Extraneous Content: For the position, we had the following candidates: Abagail Anderson, Ben Browning, Carly Cialdini, Dan Damesworth . . . [list 22 more names]. Of these candidates, we interviewed Dan Damesworth, Eli Ellsworth, and Sarah Storz.

Concise: For the position, we had 26 applicants and we interviewed three: Dan Damesworth, Eli Ellsworth, and Sarah Storz.

Recap instead of Quote

Sometimes you may be required to recount talk, whether that is a conversation, a discussion at a meeting, or even a heated debate. Recapping is a special summarization technique that captures the essence of what has been said or what has been done. It can be useful for documenting personnel issues and minutes of meetings. Instead of providing a "transcript" of an interaction, you can be much more concise by capturing the main ideas of what was said or done.

Extraneous Content: In the last staff meeting, Danny recommended that we buy a new machine. Dora asked how much it would cost. Danny said it would be about $3,000. Leo jumped in and said that a good quality machine would be closer to $4,500. Danny agreed, but said that we might be able to get a discount from our supplier. Paul said that we shouldn't be spending our money on machines when there could be more cost-efficient ways to get the work done. Morgan asked Paul for some examples…

Concise: In the last staff meeting, Danny recommended that we buy a new machine (~$3,000-4,500). The staff discussed several ways the work could be done without the new machine. They voted against purchasing the machine at this time.

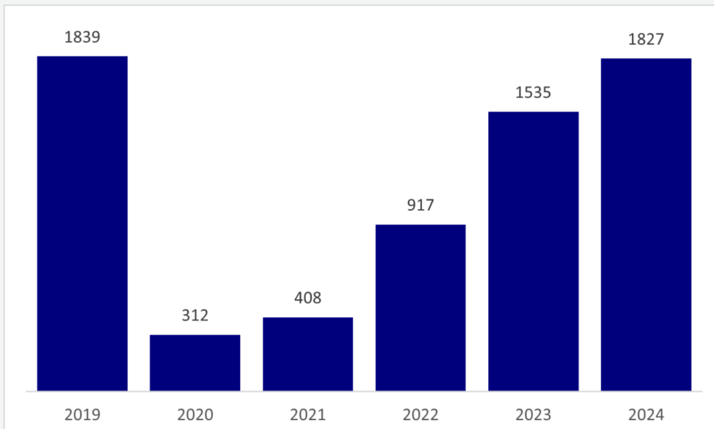
Communication Tip: **Getting Concise with Data Visualizations**

It has been said that a picture is worth ten thousand words. That adage holds true for business, too. If you have complicated data that includes a lot of data, a visualization is almost always more efficient than text.

In the one simple graphic below, you can see what the membership enrollment was in six consecutive years. You also can quickly spot the highest enrollment and lowest enrollment, as well a general trend. More complex graphics can contain even more data in the same amount of space.

You will learn more about effective data visualizations in Chapter 5. But even now, it is easy to see that this chart tells a story very concisely.

Monthly Memberships Have Nearly Returned to Pre-COVID Levels



REDUCE WORDINESS

With your content carefully selected, you should be well on your way to having a concise message. But there is still more you can do to make your message as concise as possible. The second step shifts focus from the big picture to the small details. Here, you might only delete a word or two at a time. But even these small edits can make a big difference when they are done consistently.

Trim Word Count at the Sentence Level

Here are several tactics you can use to identify and eliminate wordiness at the sentence level.

Flip Prepositional Phrases

Prepositions (those little words that express relationships between other words) can be a big waste of space when they are overused. “Flipping” prepositional phrases can reduce some wordiness. Look for phrases with the words *at, by, during, in, for, from, on, of,* and *through.* Then see if you reverse or flip the order to squeeze out the preposition. Of course you won’t be able to flip all of them, but even flipping a few can reduce your word count.

> ***Wordy:*** The firing of Campbell Jeffries was due to his violation of a policy of the company that addressed workplace bullying.
>
> ***Concise:*** Campbell Jeffries was fired because he violated the company’s workplace bullying policy.

Eliminate Redundant Pairs

Redundant pairs are words that are used together, but both mean the same thing. For instance, an "advance planning" is redundant because all planning occurs in advance. Likewise, "end result" is redundant because results come at the end of a process. Even the expression "whether or not" is a bit redundant because "whether," by definition, includes the possibility of "or not."

> ***Wordy:*** Each and every volunteer at our company charity event will receive a free T-shirt.
>
> ***Concise:*** Every volunteer at our company charity event will receive a free T-shirt.

Delete Repetition

If you see a string of words (or a string of sentences) that have similar meanings, you may be able to reduce wordiness by eliminating the repeats. Repetition can appear in a list of adjectives. Or it might appear when something is said two times in a row, but just in slightly different ways.

> ***Wordy:*** Company B's proposal was better because its design was more cutting-edge and less dated than the other designs.
>
> ***Concise:*** Company B's proposal was better because its design was more cutting-edge than the other designs.

Replace Phrases with a Single Word

There are numerous phrases we commonly use that don't add any more meaning than a single word. For instance, "due to the fact that" can be replaced with "because." "Until such time as" can be replaced by "until." "In the event that" can be replaced with "if." Look for these and other common phrases and then replace them with a single word.

> ***Wordy:*** Please make a payment in the amount of $187 no later than Friday.

Concise: Please pay $187 by Friday.

Delete Unnecessary Qualifiers

Qualifiers are words that are added to other words to alter their impact or certainty. Qualifiers could include words lessen impact ("somewhat," "kind of," "pretty much") or introduce some doubt ("might," "sometimes," "could"). They also could amplify impact of ("very," "really," "definitely").

Sometimes qualifiers are necessary. For instance, when you say a set of conditions *might* cause a problem, it is different from saying that set of conditions *will* cause a problem. In a case like this, the qualifier is necessary and you should keep it.

But other times, qualifiers aren't necessary. Some qualifiers that commonly are unnecessary are *actually, basically, extremely, kind of, practically, probably, really,* and *very.*

> ***Wordy:*** I am actually going to call him a little later this afternoon to schedule a meeting.
>
> ***Concise:*** I am going to call him this afternoon to schedule a meeting.

Strike Tentative Language

There is a kind of qualifier that deserves special attention. If you add little phrases that raise doubts—such as "I think," "I feel," and "I believe"—you are using tentative language. In addition to being wordy, tentative language can also undercut the confidence people have in you and your ideas. It also is a bigger problem for women than men. So unless you have a good reason for emphasizing that what you are saying is only an opinion, then cut it out and write more concisely and confidently.

> ***Wordy:*** I feel like I create a lot of value for the company and that is why I think I deserve a raise.
>
> ***Concise:*** I create a lot of value for the company. And that is why I deserve a raise.

Clean Up Lists

Wordiness can creep into lists. Any time you see terms like “as well as,” “in addition to,” and “not only… but,” chances are there is a list nearby. Cut those clumsy phrases and straighten out the sentences. For instance, instead of “X and Y, in addition to Z” you can say “X, Y, and Z.” It is more concise *and* clear that way.

> ***Wordy:*** Charlie was the best candidate because he had the most experience. Also, he had the best presentation, as well as the strongest letters of recommendation.
>
> ***Concise:*** Charlie was the best candidate because he had the most experience, best presentation, and strongest letters of recommendation.

Delete Little Words

Striking little words can make a difference. Give you message one last look and find anywhere you used the words “the” and “that.” Those are two places where words can be deleted without changing the meaning at all.

> ***Wordy:*** Zain decided that the best option for the summer was to live at home and work at the restaurant.
>
> ***Concise:*** Zain decided the best option for summer was to live at home and work at the restaurant.

Your Turn: **Can You Make These Sentences Less Wordy?**

Below are several wordy sentences. Using the techniques described above, how much can you trim each sentence without losing any necessary information?

1. In the event that you are unable to attend the meeting scheduled for Monday, we would like to inquire about the possibility of rescheduling it to a later date that would be more convenient for you.

2. Due to the fact that we are currently experiencing a high volume of inquiries, our response time may be delayed.

3. At this point in time, we are not in a position to proceed with the finalization of the contract due to the fact that certain key managers have not yet given their approval.

4. For the purpose of improving our customer service, we are pleased to

announce the implementation of a new feedback system.

____

____

5. In light of the fact that we have not received a response from you, we would like to remind you of the upcoming deadline.

____

____

PUTTING IT INTO PRACTICE

In business, people often don't have the luxury to read detailed documents in depth, to attend every meeting, or to listen fully to every possible idea. Because time is of the essence, you will need to be able to get your point across as quickly as possible.

You've learned strategies for selecting information and reducing wordiness to make your writing as brief as possible while still being complete. Now you are ready to begin practicing and applying the concise competency. In this section, you will learn pointers for how to develop two common forms of concise business communication: executive summaries and meeting minutes.

Message Strategy: Preparing an Executive Summary

An *executive summary* is a vital business document. It is an abridged synopsis of a longer document or report. It is designed to give busy executives and decision-makers a quick understanding of the main points, findings, and recommendations.

While executive summaries traditionally have been *part* of a formal report, you also can write stand-alone executive summaries (sometimes called *executive briefings*) to provide a concise overview of any kind of event or issue.

There are different reasons for preparing executive summaries. For instance, if you a developing a lengthy business plan proposal, you may create an executive summary that will be included in the front of the written report. If your business plan is pitched as a presentation with a slide deck (and not as a written report), you may prepare an executive summary as a one-page handout at the presentation. There may be other times when you are asked by a boss to review and report on a particular matter and you may have to do some independent research and summarize it into a short, high-level briefing that can be quickly digested.

Below are the steps to follow for writing executive summaries.

Do the Leg Work

The first step of preparing an accurate and comprehensive summary, is to gain a full understanding of what you are summarizing. Read the entire report carefully, review the full pitch deck, gather all the facts, or do whatever else work is necessary to see the full picture.

Locate the Main Ideas

You should be able to identify the big idea and articulate it in a sentence or two. What is the primary purpose of the document, idea, or matter you are summarizing? For example, is someone recommending a new vendor? Is there a particular problem that is being brought to your attention? Will there be a change coming?

You should also highlight or take notes on the critical points, data, and recommendations.

Write an Introduction

Begin the executive summary with a brief introduction that explains the purpose of the document. It is important to describe what the report covers.

Summarize the Key Points

Present a concise overview of the main points from each section of the full document. Use clear and straightforward language. Avoid jargon or overly technical terms that may not be familiar to the intended audience.

One way to determine if something is a key point is to ask yourself, is this piece of information essential to making a decision on this matter? If it is, then chances are it is key point.

Keep It Short

Executive summaries usually are 1-2 pages long. But keep in mind that while that is a good rule of thumb, there are times when even one page will be too long. For instance, if you are preparing an executive summary of a 4-page report, a 2-page summary is half the length of the full document. In that case, you are likely giving so much information that the executive summary has become redundant and is taking more time for the receiver than just reading the original document.

SAMPLE EXECUTIVE SUMMARY

Bike-to-Work Feasibility Report

Executive Summary

With the growing concern for environmental sustainability and employee well-being, Cardinal Company charged the Sustainability Task Force with conducting a feasibility analysis of a bike-to-work initiative for possible implementation by Spring 2024.

The *Bike-to-Work Feasibility Report* outlines employee feedback on their interest in the program, current commuting patterns, environmental impact projections, necessary infrastructure changes necessary to support the program, and a proposed budget.

Overall, findings indicate that a bike-to-work program is a viable option. Employees indicated strong support for the bike-to-work program. More than half the workforce expressed interest in participating, citing health benefits, reduced commuting stress, and environmental concerns as primary motivations.

Environmental impact projections indicate that the bike-to-work program would have a significant impact on reducing carbon emissions and reducing traffic congestion in the downtown area.

A significant start-up investment will be required to build the necessary infrastructure improvements, such as bike racks and increased security. Additionally, Cardinal Company should develop a clear policy framework and incentives for participating in the program, as well as organize awareness campaigns and training sessions to promote bike safety and proper commuting etiquette.

The bike-to-work program is projected to lead to long-term benefits for Cardinal Company, its employees, and the environment.

Message Strategy: Taking Meeting Minutes

Another document that is important in business contexts is meeting minutes. Meeting minutes are a written record that documents discussions, decisions, and actions taken during meetings.

Meeting minutes can be used as a reminder of particular actions taken, including when and why certain decisions were made. They can be a tool to keep organizational members accountable and for keeping up momentum on work being done. Minutes also are a good way for organizations to maintain transparency.

The key to writing good meeting minutes is to convey the important things that happened in the meeting as concisely as possible. That means that you provide enough information that if someone has to miss the meeting, they can learn what happened and what actions need to be taken moving forward.

Here are some tips for writing good meeting minutes.

Take Minutes in a Timely Fashion

If you are going to write good minutes, you will need good notes. So grab your pen and paper – or a computer – before the meeting starts and take notes during the meeting. Then finish the meeting minutes as soon as possible after the meeting while the discussions and decisions are still fresh in your mind. The sooner you write the minutes, the more accurate you will be.

Create a Header

At the top of the document, list the meeting title or subject for reference. Then note the date of the meeting at the top of the document. Also include "Minutes" as part of the header.

Add an Attendee List

Provide a list of attendees at the meeting. You may also note anyone absent. In an era of hybrid meetings, you may also want to indicate how each person joined (in-person or online).

For some meetings—like for a company-wide meeting—it may not be practical to list every attendee present. So in those cases, you may want to include attendee information in aggregate form. For example, you may simply list, "More than 300 employees in attendance."

Record Discussion Points Concisely

The most difficult step of writing minutes is capturing the key discussion points and significant contributions made by participants at the right level of detail.

If you put in too much detail, your minutes will not provide a concise record and people will find it difficult to read. If you leave out too much detail you won't have a sufficient record of what happened.

Think of the difference between these two minutes summaries:

> ***Summary 1:*** The CEO presented an overview of the budget.
>
> ***Summary 2:*** The CEO presented an overview of the budget. Even though revenues are up 5% this quarter, with rising prices for raw materials and shipping costs, overall profits are down 3%.

Document Decisions

Clearly state any decisions made during the meeting. Include the rationale behind the decisions, if applicable.

Assign Action Items

Note any action items assigned to specific individuals or teams, along with deadlines or due dates.

Distribute the Minutes

Once you have drafted the minutes, distribute them to the meeting participants. Depending on the organization's practices, you may circulate the minutes via email or share them through a document-sharing platform. You may also ask participants to review and send any corrections or revisions before a final version is approved.

SAMPLE MEETING MINUTES

Diversity, Equity & Inclusion Committee
March 6, 2024 @ 1 PM
Meeting Minutes

In-Person Attendees: Jamie Robinson (Committee Chair), Avery Brooks, Quinn Brown, Isaac Martinez, and Sofia Ramirez
Online Attendees: Reese Cooper, Cameron Lewis, Casey Mitchell
Absent: Leila Hall, David Wagnall

Approval of Previous Meeting Minutes. The minutes of the February 3 meeting were approved.

Welcome to New Members. Jamie Robinson welcomed the committee's two newest members: Isaac Martinez and Cameron Lewis.

Lunch & Learn Update. Sofia Ramirez reported on the February Lunch & Learn on Generations at Work. 42 people attended the event. Responses from the post-event surveys showed that people really enjoyed this session and learned a lot. The committee decided to repeat this topic next year.

The next Lunch and Learn is scheduled for March 18. The topic is Understanding Neurodiversity in the Workplace. There are 21 registrations so far.

> *Action Item:* All members agreed to send personalized email reminder to their own department and encourage people to attend.

DEI Annual Celebration Planning. The DEI Annual Celebration scheduled for September 15. Celebration Co-Chairs Avery Brooks and Reese Cooper provided an update on logistics.

- The $20,000 budget request was approved
- The Downtown Conference Center has been reserved for September 15
- CEO Marli Gruen has committed to deliver the opening remarks

Committee members brainstormed conference themes and selected “Building Bridges” as the overarching theme of the conference.

> *Action Item:* Casey Mitchell agreed to work with Avery to identify three prospective keynote speakers that will fit with the overarching theme. They will present the finalists at the next meeting and the committee will select their favorite.
>
> *Action Item:* Cameron Lewis will get menus and price quotes from the two company-approved caterers. Menus must include vegan and gluten-free options. He will present the options at the next meeting.
>
> *Action Item:* Quinn Brown will develop a mock-up of a logo for the conference and draft a Save the Date announcement to be reviewed and approved at the next meeting.

Reminders. Jamie Robinson reminded everyone to complete the Climate Survey by Friday.

Adjournment. The meeting was adjourned at 3:45 PM. The next meeting is scheduled for April 3, 2024.

Meeting Minutes Prepared By: Isaac Martinez

CHAPTER 5: EVIDENCE-DRIVEN

Learning Objectives

By the end of the chapter, you will be able to:

- Identify a range of different types of evidence available for business writing
- Describe the characteristics that makes evidence compelling
- Determine what kind of data visualization will be best to display your evidence
- Describe best practices for each available type of visualization
- Establish the credibility of your evidence

You also will learn message design strategies for:

- Designing an assertion-evidence slide deck

INTRODUCTION TO EVIDENCE-DRIVEN

Selecting and Presenting Compelling Evidence to Support Your Points

"Show me the numbers!" "Oh yeah, says who?" "Can we really trust this analysis?" Expect your receivers to express doubt at times about your claims and conclusions and demand better proof. It's not that they don't trust you. It's that they need to make sure that the evidence supports a recommended position before taking action. The stakes are simply too high to proceed without evidence.

Imagine what would happen if business people didn't demand solid evidence. Without comparative sales data, they might pay too much for a property. Without recent investor reports and industry forecasts, they might make poor investment decisions—perhaps selling a stock too soon or hanging onto another too long. Without checking on references, they might hire the wrong senior leader or pass up a junior level employee who could be a star. Without customer feedback, they might miss out on the opportunity to fix a small problem before it turns into a big problem that hurts the brand. Without all the facts in a dispute involving an employee, they might end up making a decision that could result in a lawsuit. The list goes on.

Because the stakes are high in business, competent business communicators know that they need to be evidence-driven. Evidence-driven refers to the ability to select, interpret, and present credible and relevant data in a compelling way. In this chapter, you will learn strategies for driving your argument forward with evidence.

GATHER EVIDENCE

Take Stock of Available Evidence

Before we jump in, some terms need to be defined. **Evidence** refers to the material you use to support the probable truth of your claims. There are two key words in this definition that need further clarification. The first is **claim**. A claim (or **point**—we'll use these terms interchangeably) refers to a debatable statement that you attempt to make other people accept or understand. In business, you will see claims about costs (is something affordable?), feasibility (is something doable?), style (is something appealing?), comparison (is something better than an alternative?), and more.

Debatable can range from mildly questionable to highly contentious. Mildly questionable claims can be disputed, but most people will accept the premise without much evidence (e.g., "New computer software licenses are expensive"). Highly contentious claims tend to be debated more passionately because they often involve politically-charged issues ("Company initiatives to reduce our carbon footprint are a waste of resources") or issues that are personally meaningful ("Outsourcing public relations is a great way to cut costs"—if any receivers work in the public relations department).

The second key term is **probable truth**. Because claims are debatable, you won't be able to prove absolute truth the way you would with a verifiable fact. Instead, you will attempt to support the claim in a way that reasonable people would conclude that your claim is likely true, credible, and believable. Of course, with highly contentious claims, that task will be much more difficult to do. That is why using good evidence to support your claims is so important in business communication. You need as much support as possible to help your receivers accept the probable truth.

With the key terms (evidence, claim, and probable truth) defined, we can move forward in learning how to identify and select evidence to strengthen your messages and achieve your communication goals.

One of the first things you might notice about gathering evidence for business communication purposes is that it is much different from gathering evidence for other purposes. In academic writing, you typically begin by searching online or in a library for articles and books. In business, you typically begin instead by sorting through and making sense of all the evidence around you. Here are some common types of business evidence.

Numerical Data

Because much of business is about generating revenue, containing costs, and maximizing the use of scarce resources, numerical data are going to be essential for many business decisions. Numbers and statistics may come from *internal* sources, such as sales, costs, profits, losses, and other financial information. They might also include things such as the number of hours spent on tasks, number of employees, and inventory data. Numerical data might also come from *external* sources, such as government data like the U.S. Census Bureau, industry reports, or academic research studies.

Textual Data

Even though numbers are extremely important, business decisions are not based on numbers alone. Another key source of evidence is textual data. Textual data include any kind of word-based information—whether the words are written or spoken. What differentiates textual data from simple text or words is that it can be qualitatively analyzed to detect patterns. Some common types of textual information in business include comments from customer reviews, open-ended employee responses to organizational climate surveys, and trending hashtags on social media.

Business Publications

Business publications provide valuable information on news and trends in business, which can serve as evidence. General business publications with wide circulations include titles like the *Wall Street Journal*, *Entrepreneur*, *Forbes*, and *Harvard Business Review.* Additionally, many professional associations publish specialized magazines that help individuals keep up with their field. For instance, human resource managers read *HR Magazine*, accountants read *Accounting Today*, and advertising pros read *AdAge*. Local business publications can be evidence, too. A local business newspaper might sometimes be the best source for information on business trends affecting your community.

Expert Opinions

While you might be tempted to think that an “opinion” doesn’t count as evidence because it isn’t a fact, think again. Opinion-based evidence is critical in business, especially when the source of the opinion is a recognized expert. In most cases, a recognized expert is someone who has collected and analyzed data in their field to make predictions or recommendations. For instance, a trusted financial advisor may predict how a stock will perform after an event, such as a company merger or a new tax code. A cybersecurity consultant may recommend steps to take to prevent your company from experiencing a data breach. An important tech industry leader such as Mark Zuckerberg or Jeff Bezos may speak about how technology will be used in the future.

Testimonials

A testimonial is a statement of endorsement. It may come from an expert or non-expert. But usually, people offering the testimonial should have some sort of personal experience with whatever it is they are endorsing. For instance, you may want to use testimonials from previous clients who had success with your consulting company or your corporate training services. Or you may ask an expert to test your product and provide a testimonial about its quality in comparison to your competitors. Testimonials are powerful because they make evidence personal.

Anecdotes

Anecdotes are short stories—sometimes true and sometimes hypothetical—that are used to support claims and illustrate points. They can be particularly helpful when you need to establish an emotional connection or when you need to provide more tangible support for your claim. For example, you might use a story about how the new employee experienced problems during the onboarding process to support your point that there are inefficiencies in your company’s current HR systems. This story may be used by itself or as an example in connection with numerical or textual data that prove your claim about HR inefficiencies.

Objects

You've probably heard the old adage that a picture is worth a thousand words. So, too, are objects. Objects are anything that can be seen or touched (or even tasted!). Especially when you are communicating with your receiver face to face, an object can be the best evidence. This is why companies roll out new products with presentations where they show pictures, play videos, and give live demonstrations.

Personal Knowledge or Experience

In some instances, you will not have outside information to support your claims and you will instead have to rely on personal knowledge or experience. This kind of evidence might include information you have been given by others, observations you have made, perceptions you hold of various situations, or documentation of what you have done. Personal knowledge is particularly helpful evidence for writing letters of recommendation, completing employee performance reviews, and documenting human resource issues such as sexual harassment or office bullying.

Select Quality Evidence

The point of sharing all these different types of evidence is to let you know that potential evidence is all around you. In contrast to academic research when you may not have enough sources or evidence to build an argument, in business you often will face the opposite problem: You will have so much evidence, you may not know where to start or what to include. Here are some rules to guide you.

Support All Claims

Every key claim or point you make should be supported by some sort of evidence. For example, if one of your key claims is that a particular option is “affordable,” you should provide evidence of its affordable price, perhaps through a cost-comparing chart of similar products. If one of your key claims is that customers have been complaining about a particular product line, then you should provide evidence in the form of an anecdote of those complaints.

For some claims, you may need relatively little support. Other claims will require much more substantive evidence. Generally, the more controversial or complex the claim, the more evidence you will need. For example, recommending a caterer for a holiday luncheon might only require evidence that the caterer can provide a tasty meal within the set budget for the event. Recommending a site for building a new office will require extensive support—from rent and utility costs, to traffic pattern analysis, to customer geo-tracking data, to aesthetics, to parking and more. And it’s likely that you will have to provide the same comparison data across multiple sites to provide evidence you’ve reached a reasonable conclusion.

Use a Mix of Relevant Evidence

While you may have a terrific source of evidence that appears to provide all the support you need, it is still smart to diversify your evidence mix. First, using multiple sources signals to your receiver that you have adequately assessed the available options for potential evidence. Second, if you rely on a single source and the credibility of that source is called into question, you will have other evidence to fall back on. Third, using multiple sources will create a more powerful and trustworthy message, which will increase the likelihood of meeting your goals.

It should go without saying, but your evidence mix should be determined with your receiver in mind. What evidence do you think is going to be the most compelling to your receiver? If you know that your receiver is a numbers person, then you may want to select your mix of evidence to be heavy on numbers. If you know your receiver is particularly swayed by powerful anecdotes, then you may select a few carefully crafted stories to support your numbers.

Use High Quality Evidence

The quality of your overall message is greatly affected by the quality of the evidence you use. If you use excellent evidence, you are well on your way to composing an excellent message and meeting your communication goals. But if you use weak evidence, your entire message may be negatively affected. That's because if your receiver identifies some of your evidence as weak—even if it's only one small piece—it may cause your entire argument to be called into question. Therefore, it is of utmost importance to use high-quality evidence. Below are criteria for evaluating evidence quality:

Accurate
The most essential quality criterion of evidence is that it must be correct. Evidence marred by miscalculations, misrepresentation, or other inaccuracies can misguide decision-making, damage your reputation, and negatively affect business. So take time to "fact check" your evidence. Here are two key questions to guide you.

First, "Does it make intuitive sense?" For instance, assume you do a salary analysis for your full-time employees and see that your lowest-paid employee makes $8,000 per year. An intuition check should tell you there is a mistake somewhere, as a full-time, minimum-wage employee would make much more. If you find evidence that doesn't pass the intuition check, you should either correct the mistake (if that is within your control) or discard the flawed evidence and search for another source.

Second, "Can it be confirmed?" If evidence is accurate, it should be able to be confirmed. Confirmation can occur in multiple ways. You could rerun analyses and double-check your own calculations. You could verify facts with a knowledgeable colleague. You could seek out other external sources to corroborate the evidence.

Recent
There is no arbitrary rule on how new something must be to be considered sufficiently recent. Instead, the principle here is that whatever evidence you use should be recent enough that newer information hasn't supplanted the information you're using. For instance, if you want to update your receiver about your social media marketing campaign, data that are more than a week old may be too old to be useful. You'll need to get more recent data. But if you are estimating costs for purchasing automobiles or advertising space,

prices from the last year are probably sufficient. And if you are using evidence from a research study on consumer psychology and how mood affects buying behaviors during the holidays, a study that is 10 or more years old might be perfectly recent. As you look for evidence, track down the most recent sources available.

Representative

Another important quality marker for evidence is its representativeness, or how accurately it reflects or represents something else. There are two important facets of representativeness. First, evidence should accurately represent the broader domain being described. Averages and midpoints tend to be more representative than highs and lows. Views held by a majority of people are more representative than views held by a single person.

For example, if customer reviews of your new product line are half positive and half negative, but you only include the positive comments when reporting to your leadership team, that would not be representative. Instead, as a competent business communicator, you would use evidence that represents the broader reality of mixed reviews and, of course, adjust your claims accordingly.

Second, evidence should accurately represent the intent and content of the source. Statistics and quotations are particularly prone to being misrepresented, whether that is by presenting only a portion of what was found or said, mischaracterizing the broader intent, or not providing enough context to make sense of the evidence. Consider the difference here:

> ***Partial Quotation:*** When asked about recent accusations of sexual harassment in the organization, CEO Paul Seaton said, "It's not my problem."
>
> ***Full Quotation:*** When asked about recent accusations of sexual harassment in the organization, CEO Paul Seaton said, "It's not my problem. It's our problem. We have to work as a company to fix our culture."

Unbiased

In many ways, all evidence is somewhat biased. Even the act of your choosing what evidence to include and what evidence to exclude introduces bias. Even though you can never be completely bias-free, you should strive to be as unbiased as possible.

In business, an important type of bias is conflict of interest. A conflict of interest occurs when someone's impartiality may be influenced by a professional or personal interest. For instance, salespeople may not present a fully unbiased account of their company's services if they will financially benefit from making a sale. Or managers may not be able to write impartial performance reviews for employees who are also friends.

Simply asking, "Who wrote this?" or "Who provided this information?" can help you determine if the evidence is reasonably free from overt bias. For instance, a source such as Wired magazine is going to present less biased product reviews than websites for the companies that make the products.

Your Turn: **What Kinds of Evidence Can You Use?**

Consider the following examples. What kinds of evidence can you use to support each claim? Try to identify at least two different types of evidence for each one.

1. Your employee has not been performing to company standards
2. Your new product launch was successful
3. Your company should adopt more sustainable, eco-friendly business practices
4. Your recent social media campaign backfired
5. Your company should buy an ad for the Super Bowl
6. Your intern should be hired for a permanent entry-level position

Change Directions if Necessary

At the heart of being evidence-driven is a commitment to letting your evidence drive the argument forward, not your personal agenda. While you may start out with a general direction in mind, stay open to the possibility that the evidence may eventually point you in a different direction. Be willing to change your goals and your message accordingly.

A case in point involves a university task force that explored the possibility of requiring all students to have a laptop computer. The task force started from the position that the college wouldn't have to invest in more computer lab upgrades if they simply required students to bring their own laptop computer to class. Other universities had done the same and it seemed to be working. So they set off to write a proposal to change policy.

They sought data for some of the key issues affecting their policy proposal, including the cost of computers and software (more than they initially expected), the availability of power outlets in classrooms (far fewer than they realized), and computer software licensing for use on personally owned computers (more complicated than they anticipated). After looking at the evidence, they quickly redirected their efforts with a recommendation to drop the proposed policy change and invest in computer lab upgrades instead.

COMMUNICATE EVIDENCE CLEARLY

Once you have your evidence selected, it is time to communicate that evidence clearly. In addition to using the Clear and Concise competencies covered in chapters 3 and 4, here are two basic skills every business communicator needs to master when communicating with evidence: presenting quotations and using numbers.

Present Quotations

One of the evidence presentation styles you may be most familiar with from academic writing is quoting. Quotations can be used to express expert opinions, testimonials, and other forms of textual data. The purpose is usually to confirm a particular point. Some of the ways you may see quotations used are in product endorsements, market predictions, and support for a particular course of action.

To quote evidence, follow three steps. First, state your claim. Second, identify the source and necessary content of the quotation. Third, present the quotation either verbatim (which means word for word) or paraphrased (which means put into your own words).

> Verbatim
> New software tools for data visualization can hinder good design. According to Scott Berinato, an expert on data visualization and the author of the book Good Charts, new software "reinforces the impulse to 'click and viz' without first thinking about your purpose and goals," which in turn, "leads to charts that are merely adequate or, worse, ineffective."
>
> Paraphrased
> New software tools for data visualization can hinder good design. Scott Berinato, an expert on data visualization and the author of the book Good Charts, explained that because new software is so easy to use, many people end up with suboptimal charts because they

jump into building their visualizations without identifying their communication goals first.[1]

Use Numbers

Because business communicators use numbers extensively, it is important to make numbers as easy as possible to read. Below are some basic rules for using numbers. The list is far from complete, but it should give you a good start.

Declare Units
It is important for your receiver to know what units you are talking about. Units refer to things such as currency, time, and sizes. You cannot safely assume that people know what units you are using. The U.S. Metric Association (2009) has a webpage dedicated to highlighting costly business mistakes that were made by not paying attention to metric units. So you will need to be specific if you are talking about U.S. dollars or Canadian dollars, weeks or months, gallons or liters, etc.

Round Numbers (Usually)
Generally, rounded numbers are easier to understand and recall than exact numbers. Especially when you are dealing with estimates, exact numbers add more detail than is necessary. For instance, if you recommend remodeling the outdated lobby of your credit union, it will be easier for decision makers to process and remember a $320,000 estimate than a $319,674.16 specific figure. Even reported (not estimated) numbers can be rounded for more clarity. Reporting that you had almost $2 million in sales or that office supplies cost $4,500 is sufficient for most communication purposes.

Of course, sometimes precision is necessary. For example, a 0.1 or even a 0.01 difference in an interest rate can mean thousands of

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1. For more information on designing goals-oriented data visualizations, check out Scott Berinato's publications: Scott Berinato, *Good Charts: The HBR Guide to Making Smarter, More Persuasive Data Visualizations* (Cambridge, MA: Harvard Business Review Press, 2016); and Scott Berinato, "Visualizations that Really Work." *Harvard Business Review* 94, no. 6 (2016): 92-100. https://hbr.org/2016/06/visualizations-that-really-work

dollars in interest over the life of a loan or investment. When precisions in necessary, use exact numbers.

Follow Conventions

In addition to different kinds of documents having conventions, there are conventions in business for how to display numbers. The conventions focus on presenting numbers as clearly as possible. The following Communication Tip shows some common U.S. business conventions.

Communication Tip: **Common Conventions for Working with Numbers**

Rule	Non-Conventional	Conventional
Separate 000s with a comma	7150 11585	7,150 11,585
Use symbols and numerals instead of word	two million dollars 1,250 euros fifteen percent	$2 million €1,250 15%
Replace 000s with notation when thousand or more[2]	5,200,000,000 units $63,000,000	5.2 billion units $63MM
Omit trailing zeros	$750.00 1,400.0 square feet	$750 1,400 square feet
Express fractions with decimals instead of words or formatted fractions	Ten and a half hours 6 ¼%	10.5 hours 6.25%
Express time in hour:minute format OR Use hour:minute format or AM/PM designation to signal time	3 o'clock 7	3:00 7:00 or 7 PM
Indicate AM/PM, especially for ambiguous times AND indicate time zone when receivers may be in different time zones than you or each other	6:30 3:15	6:30 a.m. 3:15 ET/2:15 CT

2. Business communicators sometimes use letter abbreviations to notate units, especially in number-intensive contexts such as sales or budget meetings. However, you must be

cautious because there is some inconsistency in how the abbreviations are used. You will sometimes see thousands notated with a lowercase k (metric letter for kilo) and sometimes with an uppercase M (Roman letter for mille or thousand). You will sometimes see millions notated with the letter M (short for million) and sometimes MM (to distinguish it from the M for thousand). These inconsistencies introduce ambiguity around the letter M. While $9k is clearly $9,000 and $9MM is $9 million, $9M could be either $9,000 or $9 million. The important thing as a business communicator is to be consistent with your usage and to seek clarification when interpreting numbers with these notations.

VISUALIZE EVIDENCE SKILLFULLY

Effective business communication relies heavily on visualization of evidence. Whether you are making a business presentation to a room of investors, writing an informal email in response to a request for data, or preparing a full-length business proposal to your top management team, conveying evidence in a visual way will help you be more effective.

Visualizations are effective for several reasons. First, visualizations are more concise than text. You can embed a lot of information in a simple visual that could otherwise take many paragraphs of words to communicate. Second, visuals are inherently appealing. The human eye is drawn toward images. Flip through any magazine, book, or brochure. The text on the pages starts to blur, but images grab your attention. Third, visuals can offer instant insights that text cannot reveal. With the right visualization, your receiver can, in a moment, identify trends over time, progress toward a benchmark, or key distributions.

Here we cover several common visualization tools, their uses in business communication, and some tips for each.

Compile a Table

The purpose of a table is to highlight key facts and figures so that your receiver can draw a quick summary or make easy comparisons. You might use tables to summarize and compare products features within a category, district sales for the last fiscal year, or competing bids for a construction project. You can build a table by following the steps below.

Identify the Categories of Comparison

First, you must identify the information that is going to be necessary to make a decision. Categories can represent any piece of evidence that is common to all or most things you'll be comparing. For example, if you were comparing vehicles for purchase, you might identify price, fuel efficiency, estimated cost of maintenance/repairs, estimated cost of insurance, customer ratings, and options (like Bluetooth, remote start, heated seats).

Create Rows and Columns

Next, create a row for each thing you'll be comparing and create a column for each category (or vice versa, as sometimes tables fit better on a page with the columns/rows flipped). Next, fill out each cell. As you fill out cells, be as concise as possible. Use values instead of sentences, where possible. If you want to make a point that one option is better than the others, you might even color code certain cells to draw your receiver's attention to those cells.

Order the Table Logically

Finally, order the table in a way that aligns with your receivers' needs. For instance, assume you are creating a table that compares product category sales by state. If your receiver is the vice president for sales for the entire company, she likely will be most interested in what states are at the top and bottom of the list. In that case, you should order the table by amount of sales. But if your receivers are the state territory managers who will be reading a long report and looking for their own state's data, then you might instead order them by state name so it is easier for the territory managers to find their own states.

Make a Chart

The purpose of charts is to provide at-a-glance summary data. You can choose from a wide variety of chart types.[1] Here, we cover three common

1. To identify a broader range of chart options, we recommend this book: Stephanie Evergreen, *Effective Data Visualization: The Right Chart for the Right Data* (Thousand Oaks, CA: SAGE, 2017), http://stephanieevergreen.com. The book includes both big picture strategies and step-by-step instructions for creating charts in Microsoft Excel.

ones. But before we delve into the nuances of the different kinds of charts, consider some overall advice for building good charts.

Select the Right Chart

First and foremost, it is important for you to select the right chart for what you are trying to communicate. There are several different kinds of charts that you can use. Here we cover advice for the three most common types.

Pie Charts
Pie charts represent allocations of a whole. They can be used to show a distribution of budget expenditures or how much of your workday you spend on various tasks. Best practices for making pie charts are:

- Place segment of interest at top. This keeps your receiver's attention focused on the most important slice.
- Label each segment with its category name and percentage. Direct labels are generally easier to read than using a legend.
- Don't have too many "slices" of pie. Pie charts get hard to read if they have more than 7 or 8 slices. Consolidate less important pieces into an "other" slice.
- Make sure all your slices add up to 100%. If they don't, you've made a mistake somewhere.

Bar and Column Charts
Bar and column charts compare the value or measurement of items. What makes bar (horizontal) and column (vertical) charts different from pie charts is that each number is independent and together, the values do not necessarily add up to 100%. Bar charts can be used to show annual sales volume of different flavors of ice cream or how many alumni work at various local companies. Best practices for making bar charts are:

- Logically order your bars. You should strategically order the bars in a way that will make the most sense to your receiver, whether that is alphabetical, numerical (in ascending or descending order based on value), or some other method.
- Clearly indicate the units of measurement on the y-axis.
- If your receiver needs specific numbers or if you want to emphasize the values of the bars, label each bar. If your receiver

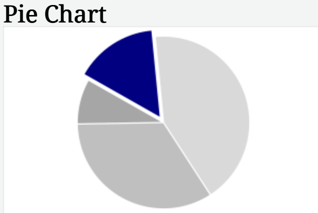
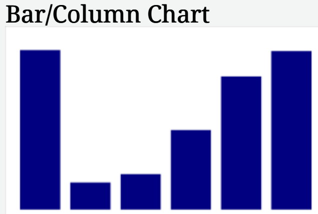
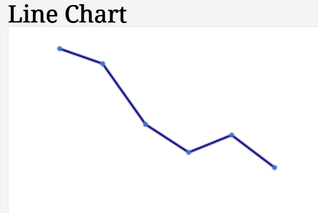
needs only to understand the basic trend, then omit the labels

Line Charts
Line charts identify trends over time. Line charts can be used to show how social media engagement has increased over time or how stock prices have fluctuated over the past week or past decade. Best practices for making line charts are:

- Represent time on the horizontal axis, moving from left to right.
- Use no more than four lines on each chart.
- Differentiate the lines using different colors or line design.
- Clearly label each line.
- Start the Y-axis at 0. If you start the axis at a higher number (called “truncating” the axis), it can misrepresent the trend you are showing.

Communication Tip: **Which Chart Should You Use?**

Choosing the right chart for your message can be challenging at times. This side-by-side comparison can help you visualize the options.

Pie Chart	Bar/Column Chart	Line Chart
		
Pie charts visualize allocations of a whole	Bar/column charts visualize values of segments	Line charts visualize values over time
Examples How much of monthly budget is spent on rent Percentage of employees who identify as a particular race or ethnicity	**Examples** Number of new accounts opened in each branch How many sick days were used in each department	**Examples** How employee turnover has fluctuated in the past three years The number of errors made since training program was implemented

Add a Descriptive Title That Asserts Your Takeaway Point

The more complete you make your heading, the less room you leave for receivers to misinterpret your intention. For instance, you might want to retitle "Annual office expenses" (which is a topic) to something more descriptive like "Annual office expenses nearly doubled last year."

Eliminate Chart Junk

Chart junk is anything that visually detracts from your central message.[2] This can include extra tick marks, grid lines, data markers, and 3-D effects that visually distract. It also can include redundant titles, legends, or data labels. With a chart, the simpler it is visually, the clearer it will be in communicating your intended message.

Use Color Strategically

Color plays an important role in how humans process information. If you use too many colors, your receiver may not know where to look. But if you make everything in your chart grey, except for the slice of pie, bar, or line of primary interest that you make pop with a bright color, then your receiver will instantly know what is most important on your chart.

Check for Stand-Alone Sense

Your receiver should be able to read your chart and understand it without having to ask additional questions. Label every element properly, including units.

Generate a List

The purpose of a list is to provide inventory of some category in a concise and skimmable way. You might need to create lists of products, clients, employees, suppliers, tasks, etc. There are two key decisions to make when creating a list.

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2. “Chart junk” is a term that was coined by Edward Tufte, who was one of the pioneers of data visualization. See Edward Tufte, *Envisioning Information* (Cheshire, CT: Graphics Press, 1990).

First, order the "members" in a logical way. The ideal ordering will depend upon your purpose and how your receivers will likely process that list. Will they search the list for names? Then list them alphabetically. Must they complete these tasks in a particular order? Then list them chronologically.

Second, determine if you should *number* or *bullet* the list. Numbered lists usually connote some sort of rank or priority ordering. For instance, you might rank your top ten sales performers for the quarter. Bulleted lists suggest equally weighted items. For instance, if you list your clients on your website, you can make them feel equally important by putting them in a bulleted list.

Communication Tip: **Keep It Parallel**

Parallel structure is a technique for conveying your ideas more clearly. **Parallel structure** means that every item in a series is worded in a similar way to all the others. For example, if you are creating a list of accomplishments, every item could start with a past tense verb. If you are creating a list of distinguishing features of a new product, you might start each item of the list with an adjective.

Not Parallel	Parallel
• Selling products • Responsible for delivering customer service • Selected for management trainee program • "Employee of the Quarter" award	• Achieved sales targets • Delivered exceptional customer service • Selected for management trainee program • Awarded "Employee of the Quarter"

Draw a Map

The purpose of maps is to visually represent a variable across geographic space. Maps can be used to show unemployment trends, cell phone service coverage, or store locations. And with new map making technology, even a novice can create custom maps.

The most important thing to know about maps from a business communication standpoint is that making a good map begins by making higher-ordered decisions about your map. How much detail do you want to show? What details do your receivers need? For example, if you only need to know how many customers are in each state, you might use low-detail a map with darker shades indicating more members and lighter shades fewer members. But there may be other times when you need much more detail and will have to be able to pinpoint specifically where something is located.

Create an Infographic

The purpose of an infographic is to visually display evidence in an eye-catching way. This style of visualization is growing in popularity in recent years and typically involves very large font sizes, striking color, and/or icons. You can use infographics to emphasize startling statistics or highlight interesting tidbits of information. Here are some best practices to keep in mind.

First, you should identify which pieces of evidence are best suited to be presented as an infographic. For instance, if you have a pie chart that shows 95% of customers would buy from the company again, that would probably be more impactful as an infographic. Second, just like charts, infographics should not be cluttered. So use simple graphics and fonts. Finally, infographics should be substantive and helpful to your claims instead of functioning only as a “decoration” in the midst of boring text.

Your Turn: **Which Data Visualization Would You Use?**

Which data visualizations would you use for each of the following scenarios?

Showing the growth of regional coverage of your franchise locations over time

---

Demonstrating that employees are making too many photocopies

Showcasing the top 10 sales representatives from last quarter

---

Comparing cell phone plans

Celebrating a record year in sales

Providing a breakdown of customer service calls completed by employee

---

Questions to Ponder

1. Choose one of the scenarios above and draw two different visualizations. What are the strengths and weaknesses of each?

2. What visualizations are most appealing to you? Why?

ESTABLISH EVIDENCE CREDIBILITY

You probably already know that it is important to cite your sources so that you will not be plagiarizing. But in business, citing sources does something even more important. It establishes the credibility of your evidence *and* your personal credibility as a business professional.

If the evidence is a key part of your argument, you may want to consider providing a footnote in a hardcopy document that contains information about the source. If you are preparing an electronic message (whether in an email or in a report that will be made available in PDF form), you should hyperlink to the original source.

When it comes to citing sources, there is not one right way. For academic writing purposes, you may have been required to cite sources according to MLA (Modern Language Association) or APA (American Psychological Association) styles. While specific citation styles are common in academic writing, most business writing does not follow academic guidelines like these. But just because you won't be required to follow a set of rules about how *exactly* to cite sources (Is the article title capitalized or lowercase? Do you need a comma or a period there?), you still are responsible for citing your evidence.

Evidence may include information that is publicly available (e.g., data from the U.S. Census Bureau or stock prices from the NYSE), privately held (e.g., a market analysis report provided by a hired consultant or salary data provided by your company's HR department), or generated by you personally (e.g., when you perform sales projections or analyze company spending on vendors). Here are some basic strategies for citing your evidence for increased impact.

Externally-Sourced Evidence

If you get evidence from external sources (such as websites, business publications, etc.), then you will need to share information about the source of the evidence. How much information you share will depend upon the specifics of the source, but typically you want to provide your receiver with information about *who* created the evidence (author), *when* the evidence was created or published (date), and *where* the evidence can be found (website, magazine, data portal).

If your source is from a *widely known* and *credible* source, then the source name might suffice for establishing credibility—whether the source is an agency, a publication, or a person.

> ***Examples:***
> “The Bureau of Labor Statistics reported this week that unemployment….”
>
> “According to a study published in *Harvard Business Review* in 2023….”

If your source is from a *credible* source that is *not widely known*, then you will need to explain why the source is credible.

> ***Examples:***
> “According to Douglas Korpi, an investor with more than 30 years of experience funding startups, the most important….”
>
> “Digitel, a marketing research firm specializing in interactive visualization, predicts that….”

If a source is *widely known* but it is *not credible*, proceed with caution. If you can’t make a strong case for your source and evidence being sufficiently high quality, it is better to use different evidence.

Internally- or Personally-Sourced Evidence

If you use evidence that you got from internal sources (such as data from HR, internal sales projections, etc.) or that you personally developed, your job is to explain your source and analysis in enough detail to establish the credibility and trustworthiness of your evidence. Here are two key pieces of information you should include.

First, include the *source* of your data. Were data provided by the accounting department? Are you using data from your social media analytics service? Did you conduct your own data collection? By identifying the original source of the data, you will establish that your data came from a trusted source.

Second, concisely describe your *analytic steps*. What tools did you use and what steps did you take to reach your conclusions? Did you use a data visualization tools to identify your insights? If you excluded any cases, what criteria did you use? Did you calculate statistical tests? How did you choose what text excerpts to use? By describing your analysis in sufficient detail, you will instill confidence that your interpretations can be trusted.

> ***Example:***
> "For my analysis, I used current salary data provided by the Human Resources Department. It captured all salaries as of July 1, which is the first day of the current fiscal year. I excluded all part-time employees and all C-suite executives so those outlying salaries would not skew the results. Then…"

PUTTING IT INTO PRACTICE

If you are like most people, the evidence-driven competency will be one of the most difficult competencies to develop and master. It requires you to examine potential evidence and determine what will be the most compelling support for your claims; to communicate that evidence through a mix of text, numbers, and visualizations; and to cite the sources of your evidence in ways that support your credibility.

The strategies we share in this chapter are only the tip of the proverbial iceberg when it comes to being evidence-driven. As you get more experienced and as you become more embedded in a particular organization or industry, you certainly will learn additional strategies for presenting evidence. And chances are that future technological developments and advances in the data analytics field may generate even more options for communicating evidence.

One recent advance in communicating evidence is a different approach to designing presentation slide decks called Assertion-Evidence Slide Design. By following its principles, you can create powerful and memorable business presentations.

Message Strategy: Designing Assertion-Evidence Slide Decks

Steve Jobs once stated, “People who know what they’re talking about don’t need PowerPoint.” Yet, conventions often dictate that business communicators should provide visual aids. So that means that slide decks are likely here to stay.

But the problem with slide decks is that they are often really boring. In particular, PowerPoint was originally designed with only one kind of data visualization in mind: the list. You have probably seen countless numbers of these kinds of presentations as a student. They have a title on each slide, a bulleted list, and maybe an image for interest.

Given that there are ways to present evidence in more effective and compelling ways, why stick with just lists in presentations? In this message strategy chapter, you will learn how to dramatically improve your slide decks with a relatively new approach called Assertion-Evidence Structure.

The Assertion-Evidence Structure is an approach to designing slide decks that was developed by Michael Alley, an expert in engineering communication.[1] While it started out as an approach in engineering and science, its basic principles apply equally well to business presentations.[2]

The basic premise of Assertion-Evidence structure is that replaces boring and ineffective traditional slide decks with a more flexible format that has two key components on every slide: (1) a concise assertion (or **claim** or **point**) supported by (2) visual **evidence**.

The Assertion-Evidence Structure has several benefits. First, research has demonstrated that Assertion-Evidence slides are easier to comprehend because each slide presents one clear idea. Second, Assertion-Evidence slides are remembered longer because they tap into both visual and auditory brain processing. Third, receivers find Assertion-Evidence slides more visually appealing and engaging.

There also are some indirect benefits of Assertion-Evidence slide decks. Often, business communicators gain more clarity about their main ideas and evidence, simply by developing their slide decks with Assertion-Evidence principles in mind. Also, because slides usually have very little text, business communicators are no longer tempted read slides to their audiences and will, in fact, be more engaged with their receivers. It shouldn't come as a surprise then that when Assertion-Evidence slides are done well, perceptions of the speakers' professional and credibility are boosted.

Creating an Assertion-Evidence slide deck does take some creativity and deep thinking. Below are the steps.

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1. For more information about the development of the Assertion-Evidence Structure, you can read Michael Alley, *The Craft of Scientific Presentations*, 4th ed. (New York, NY: Springer, 2018). You can also check out his website at https://www.assertion-evidence.com/
2. You can watch a video tutorial on Assertion-Evidence slide design by the late business professor Robert Yale at https://www.youtube.com/watch?v=xNW84FUe0ZA

Write an Assertion for Each Slide

Once you have your overall plan in place for your presentation, it is time to create the individual slides that support each point. For each slide write one complete sentence that clearly states your point or claim. Even if the assertion is in a large font size, it should be able to fit in one or two lines of text. Perhaps most importantly, each slide should have one *and only one* assertion.

In the following example, a traditional PowerPoint list-style slide that contained three claims is transformed into three separate Assertation-Evidence slides.

> ***Traditional Format:***
> Slide 1:
> Ream Case Benefits
>
> - Affordable
> - Large selection
> - Sustainability promise
>
> ***Assertion Format:***
> Slide 1: Ream Case is the most affordable option.
> Slide 2: Ream Case has a large selection of supplies.
> Slide 3: Ream Case shares our commitment to sustainable business practices.

Select Visual Evidence for Each Assertion

The next step is to choose some sort of visual evidence that supports each claim. Visual evidence can include any kind of data visualization (charts, tables, graphs, maps), but it also can include things like photographs, icons, flow charts, diagrams, illustrations, cartoons, clip art, and more. There are two things to keep in mind when selecting visual evidence. First, visual images are no longer just for decoration. They are part of the core message. That means you must choose visual evidence that directly supports each claim. Second, you need to apply all the principles you learned about effective data visualization.

Returning to the example, we can look at the claim "Ream Case is the most affordable option."

> ***Weak Visual Evidence:*** Ream Case's company logo. It is weak because it does not say anything about affordability.
>
> A photograph or clip art image of money. Even though money has something to do with affordability, it doesn't actually visualize anything about Ream Case's affordability.
>
> ***Acceptable Visual Evidence:*** A screen shot of Ream Case's "Low Cost Guarantee" webpage. This image connects the idea of Ream Case and affordability. But it doesn't show that they are the *most affordable.*
>
> ***Strong Visual Evidence:*** A chart that compares price quotes of Ream Case and the other competitors. This image directly illustrates that Ream Case is more affordable.

Add Citations, if Necessary

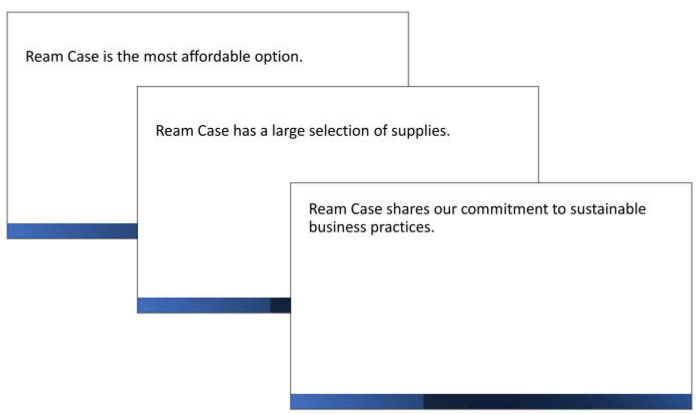
If you use images that someone else created, you should cite the source. Doing so not only gives credit to the source, it also builds your credibility. One approach to citing slides in a slide deck is to provide an abbreviated citation in the lower corner of the slide.

> ***Example:*** "The Science of Strong Business Writing," *Harvard Business Review,* 2021

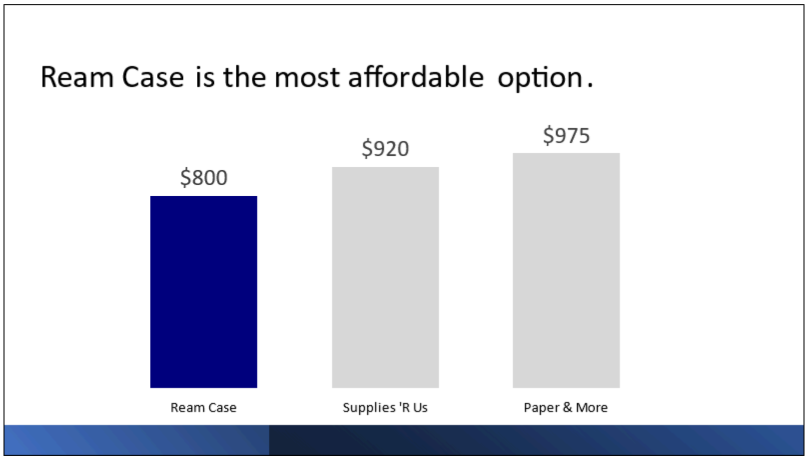
SAMPLE ASSERTION-EVIDENCE SLIDE DECK

Traditional slide. Contains a text-based list and clip art.

Assertion. Each claim is written as a complete sentence with one sentence per slide.



Assertion-Evidence. Every assertion is paired with visual evidence that directly supports the claim.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CHAPTER 6: PERSUASIVE

Learning Objectives

By the end of the chapter, you will be able to:

- Describe ethical expectations for persuasive communication
- Set an overarching persuasive strategy
- Identify the additional components of receiver analysis necessary when attempting to persuade
- Develop a supporting structure for a persuasive argument, including claims and evidence
- Explain at least one advanced strategy for adapting your persuasive strategy based on your receiver
- Define and identify six different types of fallacies

You also will learn message design strategies for:

- Requesting funds
- Proposing a business idea

INTRODUCTION TO PERSUASIVE

Convincing Others to Support a Position or Take Action

Doing business involves making many, many decisions on a daily basis. Business professionals regularly decide things like how to allocate scarce resources, what vendors to select for a project, who to hire, whether to make changes to company strategy, when to schedule events, where to locate a new office, and more.

For every decision that needs to be made, there often are multiple options, with pros and cons for each. Complicating matters further, stakeholders usually have different opinions about what the best course of action should be. That's where persuasion comes in.

Persuasion is the act of motivating a receiver through communication to change a particular belief or behavior. For example, sales professionals may need to convince their manager to purchase a new software program to better track clients' preferences. When there are multiple requests and not enough budget to fund them all, they have to show that their idea is the most critical. Entrepreneurs may seek funding for their start-up ventures from prospective investors. When investors want to only invest in ideas that have a strong likelihood of succeeding, entrepreneurs have to demonstrate that they will be successful.

Being persuasive is the most complex of all the business communication competencies. That is because being persuasive requires you to be skilled in all the other competencies, too. You have to be *professional* to get people to pay attention to your message and view you as a trustworthy communicator. You need to be *clear* to present your bottom line and organize your argument so that your receiver will know exactly what you are proposing. You need to be *concise* so that you don't waste your receiver's time. And you need to be *evidence-driven* to ensure that your receiver is confident that you have a solid case.

Persuasion has its own set of special skills as well. People who are competent at persuasion have the ability to make sophisticated choices about how to set overarching persuasive positions, how to build a structure of supporting claims, and how to leverage evidence to advance those claims. They also know how to apply advanced persuasive techniques and avoid fallacies in their persuasion attempts. In this chapter, you will learn strategies for changing people's beliefs and behaviors.

PERSUADE ETHICALLY

Before getting too far into the how-to of developing persuasive messages, it is important to step back and consider the big picture of ethical persuasion. Ethics are systems of moral, social, and cultural values that govern behavior, beliefs, and interactions. Put another way, ethics are a standard of what is considered right or wrong.

Ethics can be shaped by personal and social backgrounds, family, religious beliefs, and community. In business contexts, additional sources of ethical guidelines can include laws, industry-based codes of ethics, and company policies.[1] For example, accountants are required to follow federal, state, and local laws regarding financial reporting, as well as the Association of International Certified Professional Accountants' Code of Professional Conduct and the policies of the respective accounting firms where they work.

Being ethical means knowing standards of right and wrong that are appropriate to the context and then upholding those standards. Specifically, ethical business professionals do more than just ask, "Am I legally allowed to do this?" They ask, "Is doing this the right thing to do?"

While it is important to be an ethical communicator at all times, it is even more critically important to uphold ethical standards when you are persuading someone. That is because when you are engaging in persuasion, you are attempting to influence someone's beliefs and behaviors. Whatever actions are taken as a result of your persuasion attempts can have real implications—for your receiver, for the business, for stakeholders beyond the immediate exchange, and for future decisions as well.

1. Laws are one type of guidelines that clearly demarcate right from wrong. But the law is only one small part of ethics. There are plenty of things that may be legal, but not ethical. For example, it may be legal to gossip about a coworker, but that doesn't make it the right thing to do.

In this section, you will be introduced to two big picture guidelines to guide your thinking about being an ethical persuader: thinking about your long-term goals and thinking about your receiver.

Your Turn: **What is Your Profession's Code of Ethics?**

Many business professions are guided by a code of ethics. There are industry-wide codes for many business professions, such as accountants, advertising professionals, real estate agents, procurement managers, attorneys, and the list goes on. Additionally, businesses frequently create their own codes of ethics or ethics-based policies.

Based on your career plans, what codes of ethics can you find? You might look up codes of ethics for your profession. You might also look up codes of ethics for your company or a company where you'd like to work.

Questions to Ponder

1. What are the primary principles of your professional code of ethics?
2. How is communication addressed in your professional code of ethics?
3. Which ethical standards surprised you most?

Think About Long-Term Goals

Whatever your specific instrumental goal is, when you are persuading a receiver, your underlying goal is to be successful in your attempt to influence. But taking a "win at all costs" approach to persuasion—an approach where you take any and every action necessary to win, regardless of whether it is ethical or not—is an unwise move in business.

Let's go back a moment to the foundational principles of business communication. Business communication has three goals: an instrumental goal, a relational goal, and an identity goal. While relational and identity goals are idiosyncratic and set by the communicator, they should never include unequivocally negative goals.

Therefore, should a "win at all costs" approach lead you to apply unethical influence tactics, even as you achieve your instrumental goal, you could undermine your relational goal and identity goal.

For instance, consider Phoebe, who wants to persuade her company to develop a new product line. If Phoebe is deceptive in her presentation of claims and data, she might "win" the argument and meet her instrumental goal. But should company leaders determine that Phoebe intentionally falsified, fabricated, or withheld critical information, leaders likely will feel betrayed and disrespected, which will damage Phoebe's relationship with them. Furthermore, they almost certainly will view her as dishonest and unethical, which will tarnish Phoebe's reputation.

Not only will damaged relationships and a tarnished reputation make Phoebe's future persuasive attempts much more difficult, it is possible that her current persuasive attempt still may fail. That is, once Phoebe's deception is detected, the leaders may change their course of action and rescind any earlier commitment to the new product development.

The moral here is that any short-term gains from unethical attempts to influence will be offset, if not heavily outweighed, by long-term losses. In contrast, ethical persuasion can build long-term trust and, when successful, can create lasting changes in beliefs and actions. Therefore, you would be well-served to "lose" some persuasive attempts throughout your career than you would be to use unethical tactics to secure short-term gains.

Think About Your Receiver

A receiver-centric point of view on persuasion provides a good vantage point for understanding expectations about ethics. Receivers generally want to make the best decision possible. To do that, they need all of the information necessary to make a decision and they need the freedom to make the decision they think is best.

However, not all attempts to influence decision-makers are ethical. Below we describe three expectations receivers have for influence attempts and identify ways in which unethical influencers can violate those expectations. The use of the terms "influence" and "influencer" are intentional and used to draw attention to the fact that the unethical tactics described below do not have a place in ethical persuasion efforts.

Receivers Expect the Truth

Receivers rely on honest information to evaluate claims and make good decisions. Therefore, they expect the truth in persuasive appeals.

Unethical influencers, however, can resort to **deception** to achieve their instrumental goal. Deception is an unethical attempt to induce agreement by making an untruthful case. Deception can serve the purpose of making an alternative appear better than it really is or supporting a claim when there is not sufficient support. There are three primary types of deception common in business.

Lying occurs when an unethical influencer presents as true claims and/or evidence that are known to be false. An example of lying is knowing that a product breaks after three months of use, but telling your receiver that it will last five years.

Fabrication involves creating or manufacturing information to be presented as true. An example of fabrication is writing several product reviews and then presenting them as evidence of having highly satisfied customers.

Omission is the intentional exclusion of negative or unflattering information that is relevant to the decision-maker. An example is knowing that several people have been hurt using your product, but not alerting your receiver about the problems.

Receivers Expect Straightforwardness

Receivers often are confronted with multiple claims and mountains of evidence as they evaluate persuasive attempts. Being able to trust information that is presented to them on-face value reduces their cognitive load and helps them make decisions more readily. Therefore, they expect straightforwardness in persuasive appeals.

Yet, unethical influencers sometimes resort to **manipulation**. Manipulation is an unethical influence technique used to induce agreement by distorting the truth. Here are two common types of manipulation that occur in business contexts.

Cherry picking involves presenting only *selective* evidence instead of *representative* information. For example, when only a few customer service reviews are favorable and most are negative, sharing only positive reviews—even though they are truthful reviews—would be cherry picking.

Misrepresentation occurs when unethical influencers present information unclearly, incorrectly, or in opposition to normal conventions with the intention of getting receivers to view the evidence in a particular way.

There are numerous ways unethical influencers can misrepresent data. For instance, they might present facts without context (claiming "We are ranked in the top three financial services companies in the city," but not mentioning that there are *only* three financial services companies), omit relevant details (claiming "Our employees are paid well, earning $18 per hour," but not mentioning that only $8 is paid by the company and the other $10 is estimated based on average tips), or use deceptive data visualizations (such as the one in Figure 1 below).

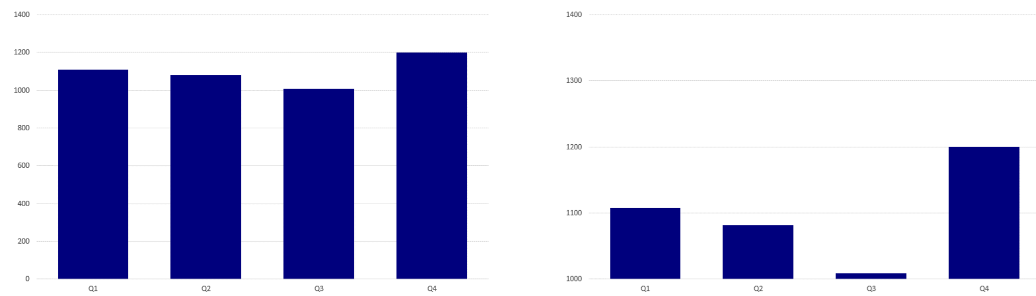

Figure 1. Unethical influencers can manipulate interpretations of data by creating charts and graphs that mislead. One common trick to look for is the truncated Y axis. A truncated axis occurs when the numbers on the vertical axis begin at a number other than 0. In the example above, the two charts show identical data. But fluctuations that appear relatively small with a full axis (the chart on the left) look very large with a truncated axis (the chart on the right).

Receivers Expect Freedom to Choose

Finally, receivers need to retain their agency, which is their capacity to make a decision of their own free will. By doing so, they know that they are not being forced to do something that goes against their own interests or the interest of the greater good. Therefore, receivers expect that persuaders will respect their right to make a free choice when presented with the facts.

But unethical influencers do not respect their receivers' right to make a decision and instead may resort to **coercion**. Coercion is an unethical influence technique used to induce agreement through limiting or eliminating the ability of receivers to make decisions based on the merits of the appeal. There are several ways in which someone could coerce a receiver.

Threats are intentions to deliver a negative consequence if someone does not agree to the persuasive appeal. Threats can be explicitly stated or implied. They might include the loss of employment, friendship, or future opportunity. They might also include threats to reveal secrets, discredit an individual, or retaliate if a decision isn't made in the desired way.

Promises are the reverse of threats. But instead of coercing through negative outcomes, unethical influencers induce agreement through a commitment to give something valued in exchange for making the desired decision. Promises can include favors, preferential treatment, money, or anything else of value. Two types of promises made in business contexts are bribes (payments made in advance and in exchange for a desired decision) and kickbacks (pre-negotiated payments made after a decision). In many cases, bribery and kickbacks are illegal. But in all cases, they interfere with a decision-maker's ability to make unbiased decisions.

Intimidation involves exposing and exploiting receivers' vulnerabilities and making them feel that they do not have the power to make a different decision than the one desired by the unethical influencer. Intimidation can arise from formal hierarchy (someone being told, "because I'm your boss and I told you to") to informal relationships such as bullying.

Collectively, receivers' expectations provide general guides for ethical persuasion: Be completely honest, do not attempt to mislead, and do not interfere with your receiver's right to decide. You also can use the FAIR Test, described in the Communication Tip box below, as a way to evaluate your own communication efforts.

Communication Tip: **The FAIR Test for Ethical Persuasion**

If you want to evaluate the ethics of your persuasive attempts, you can use the FAIR Test, which was developed as a standard for professional communication by business communication professor Peter Cardon.[2] When you write a persuasive message you can ask yourself the following questions.

Facts. *Am I presenting the facts accurately and completely?*
Ethical communicators use accurate information, include all relevant information, and present their evidence so that they do not mislead or deceive their receivers.

Access. *Am I making my motives and reasoning accessible?*
Ethical communicators are accessible when they are transparent with their receivers. They are upfront about their motivations, declare any conflicts of interest, describe how they obtained their information, and share their reasoning with their receivers.

Impacts. *Am I making a positive impact?*
Ethical communicators consider the impact they have on their receivers and all other stakeholders affected by their persuasion attempts. They make concerted efforts to minimize negative impacts and maximize positive impacts.

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2. For a full write-up, see: Peter Cardon, *Business Communication: Developing Leaders for a Networked World* (New York: Mc-Graw Hill, 2024).

Respect. *Am I respecting my receiver?*
Ethical communicators respect their receivers. They know that others can have different views and accept that receivers are free to choose. They don't attempt to coerce people to make a decision and don't take advantage of others.

SET YOUR TOP-LEVEL STRATEGY

Sometimes the thought of building a persuasive argument can feel overwhelming. Especially when stakes are high or there is a lot of work to be done, it can be tough to know exactly where or how to begin.

But rest assured, you already have the know-how to get started. Going back to the basics, you know that effective business communication is goals-oriented and receiver-centric. Now it is time to learn additional strategies for goal setting and receiver analysis that setting your top-level strategy for successful persuasive efforts.

At the outset, it is important to note that even though these tasks are presented in a sequential order, you likely will complete them in an iterative manner. That means that you repeatedly go back and forth between setting goals, analyzing your receiver, changing your strategy, doing more receiver analysis, tweaking your goals, and so on.

Establish Your Overarching Persuasive Position

A core task of building persuasive arguments is to set your goals. As with all messages, your instrumental goal will be based upon what you want to accomplish. But specifically with persuasion, you have to consider whether you want to change what your receivers *believe* about something or influence them to engage in a particular *behavior*. (Of course, you also will set your identity and relational goals.)

Once you have decided upon your instrumental goal, you then must determine the best approach for presenting it. The term **overarching persuasive position** refers to the combination of your instrumental goal and the type of persuasive appeal you use. Below are four types of persuasive appeals common in business contexts.

Present a Recommendation

If your goal is convince your receiver to make a particular choice among options, change the way something is done, or do something new, you likely will be making a recommendation. A **recommendation** is a persuasive appeal that involves directly advocating for (or against) a formal course of action. Formal courses of action could include such things as adopting or changing a policy, implementing a program, moving into a new market, or firing the office bully.

Recommendations usually are worded as *should statements*. You can present a recommendation by specifically saying “we should” or “you should.” But the word *should* is not absolutely necessary. You can present a recommendation in a variety of ways, just as long as it would be possible to state it as a should statement.

> ***Example:*** We should implement a bike-to-work incentive program.
>
> ***Alternate:*** I recommend that we hire Ream Case Co. as our office supplier.

It is worth noting that because recommendations are worded in a direct and rather forceful way, they tend to be more persuasive when the person making the recommendation has some sort of authority to do so. Authority can be granted in multiple ways: you could be decision maker or leader in the organization, be a member of a committee that is tasked with addressing a particular challenge, or work in an organization that has a culture of innovation and is open to ideas from everyone.

Make a Request

There will be many times when you want to persuade someone to take a particular action, but you are not in a position to tell your receivers what they should do. For instance, you may want to persuade your boss to give you a raise. But *recommending* he or she do so probably isn’t going to work very well. Instead, you will be more successful if present your persuasive appeal as a request. A **request** is a persuasive appeal in which you formally ask for a particular outcome.

Requests are usually worded more tentatively and acknowledge that your receiver has the prerogative to approve or deny your requested course of action. Below are two different ways to state the same request.

> ***Example:*** Would you pay for me to attend a data visualization conference?

> ***Alternate:*** I am requesting funds to purchase a multi-user software license for my department.

Appeal to Action

There may be occasions where you want to persuade people to do something, but neither a formal recommendation nor a request seems quite right. Perhaps you want coworkers to contribute money to a gift fund for a colleague who is retiring or maybe you have launched a new corporate social media account and want employees to follow you and engage with the content.

In cases like these, your desired behavior does not rise to the level of making a formal business recommendation. Additionally, even though you may asking your receiver to do something, it is not a formal request that requires approval. In these cases, you would make a casual appeal to action. An **appeal to action** is a persuasive appeal in which you encourage someone to take an immediate action.

> ***Example:*** Please sign up to volunteer on Saturday for our Day of Service community project.

Influence a Belief

Sometimes the your persuasive goal may not be explicitly tied to an action-based outcome—or at least not an immediate action. Instead, you may want to change how your receivers think about something. For example, you might want to convince organizational leaders that something is a problem or change employees' attitudes about the importance of sustainable business practices. Being successful in these persuasive endeavors could serve as a first step towards a longer-term persuasive goal.

Broadly, there are two ways to think about influencing beliefs. **Arguments of fact** are persuasive appeals that take a persuasive position on something that is or will be. Unlike facts, which are statements broadly accepted as true, arguments of fact involve debatable positions.

> *Example:* Our start-up will be profitable within two years of product launch.

Arguments of value are persuasive appeals that take a subjective position. They can be arguments about whether something is good or bad, important or unimportant, proper or improper, etc.

> *Example:* Raising the wages of our lowest paid employees to a living wage is the right thing to do.

Understand Your Receiver

Another core task of building your persuasive strategy is to understand your receiver. All of the steps you learned earlier about receiver analysis still apply, as you will need to understand your receivers' content needs and your relational dynamics. But when it comes to persuasion, there is even more to consider.

Anticipate Your Receiver's Information Needs

In order to persuade someone, you will need to anticipate all the information they will need to make a decision. In addition to the who, what, where, when, why, and how framework that you apply to all your messages, in persuasive appeals, even more information will be needed.

For example, if deciding between alternatives, your receiver will need to know what the other alternatives are and how each alternative compares to one another. If deciding whether to adopt a particular recommendation, your receiver will need to know the pros and cons of the proposed action and what the likely impacts are. If deciding whether to approve a request, your receiver will need to know what they are approving, how much it will cost, and what the expected benefits will be.

Identify Your Receiver's Decision-Making Criteria

The criteria that people use to make decisions can vary widely. Sometimes decision-makers are motivated strictly by the bottom line. Other times, other factors may enter the mix and decision-makers will also consider such things as environmental impact, fairness, ease of implementation, risk, employee morale, and ethics. So you will need to identify your receiver's specific decision-making criteria.

For example, if you know that your receiver is concerned primarily with the budget, you will know that you you have to provide detailed information about financial impacts. If your receiver is someone who cares strongly about environmental impact, you will know that questions about carbon footprint will have to be addressed.

Determine Your Receiver's Favorability

Knowing your receiver's favorability toward your position is essential for designing your overall argument. As a general rule, the less favorable people are to your position, the more challenging it will be to persuade them.

If your receiver is generally favorable, you may only need to provide basic supporting evidence. But if your receiver is neutral or generally unfavorable, you likely will have to develop a much more heavily supported argument.

You can determine receivers' favorability in several different ways. First, you can use perspective-taking. For instance, you could ask, "how would I feel if I were my receiver?" Second, you can examine past behavior. You could look at previous decisions your receiver made or statements your receiver may have made in the past on the topic. Third, if you have direct access to your receiver you can ask him or her directly. If you don't have direct access, you might even be able to ask others who have a closer relationship with your receiver.

Additionally, when you have neutral or unfavorable receivers, it will be important to understand their likely objections. For instance, if you expect that your receiver will be unfavorable toward your proposal because it seems too difficult to adopt, then you could present information on how recent changes have made adoption much easier.

Evaluate How Your Receiver is Impacted

Another important component of receiver analysis for persuasive messages is evaluating how receivers will be impacted by what you are proposing. This should go without saying, but people are going to be more likely to respond positively to persuasive attempts that have a positive impact and respond negatively to those that have a negative impact.

But it's not that simple in practice—especially because people generally have a tendency to like predictability. When you are proposing change, the first thing that comes to mind for many people is, "Uh oh. What (bad thing) is going to happen to me now?" That means that even if you are proposing something that will have a positive or neutral impact, your receiver still may be inclined to start from an unfavorable position.

You can evaluate receiver impact by asking yourself, "What's in it for them?" You should consider the following questions:

- Who will (and won't) be impacted?
- What benefits may occur?
- What harms may occur?
- What will (and won't) change?
- What will my receiver be expected to do?
- What else is at stake?
- What are the long-term consequences?

Answering these questions will help you tailor how you create your message for your receiver. Also, it is possible that by answering these questions up front, you may identify some impacts that will ultimately change your position before you begin.

Your Turn: **What's Your Strategy?**

Imagine that you are an entry-level employee at your company. There were 14 people hired at the same time as you. You all met at the first-day orientation. Many of you exchanged contact information and have continued to keep in touch even though you work in different departments.

But now six months later, nearly half of your cohort have quit and you know at least two more people who are actively looking for other jobs.

Because you work in the human resources department, employee retention is something that you care about. And you know that your company cares about retention, too. But at the same time, you've been hearing managers grumbling that it is just a problem with "the younger generation and their lack of motivation to work."

But because you know these individuals personally, you know that's not true. One of the most significant problems with retention is that employees don't feel like there is a future at the company. Apart from the first-day orientation, onboarding is non-existent. Career paths are unclear. Managers seem unwilling to mentor young employees.

You want to persuade your company to invest in a more comprehensive employee development program. Your manager, who is the Vice President for Human Resources, has told you that he is open to hearing your suggestions. But you need to come up with a strategy before you pitch your idea.

What is your instrumental goal?

Which persuasive appeal will you use? Why?

What is your overarching persuasive appeal? Write it out.

What are five specific pieces of information and/or insights would you seek about your manager before presenting your case?

STRUCTURE THE ARGUMENT

Now that you have set the top-level strategy for your persuasive appeal, you can turn your attention to developing the structure for your persuasive argument. The basic structure of an argument is to have an overarching persuasive position (which you already established), which is supported by persuasive claims, which in turn are supported by evidence. You can see this illustrated in Figure 1.

Figure 2. Visual representation of persuasive argument structure.

Here are some guidelines for building a persuasive structure for your own messages.

Build Your Supporting Claim Framework

With your overarching persuasive position in place, your next task is to identify the claims that are needed to support your position. You can think of your supporting claims as pillars that hold up the probable truth of your argument. Building a supporting claim framework consists of identifying necessary claims and then ordering them.

Understand Types of Claims

A good starting point to identify specific claims for your argument is to understand the types of claims that you can make. Recall that claims are debatable statements that you attempt to make other people accept or understand. There are several types of claims you can choose from to support your persuasive position.

> **Comparative Claims**
> A comparative claim is a claim that one alternative is better than (or worse than) other options. This kind of claim is useful if you want to influence your receiver about the relative ranking of competing options. Comparative claims usually are worded in ways that directly assess the options against one another and may contain words like better/worse, more/less, or any word in the superlative form (words ending in *-est*).
>
> > *Example:* Sara Pandey is the strongest candidate for the job.
> >
> > *Example:* Of the three new project options, Option B is the riskiest.
>
> **Causal Claims**
> A causal claim is a claim that one phenomenon causes another phenomenon to occur or change. This kind of claim is useful if want to persuade someone that a particular issue is the source of a problem, or perhaps alternatively, if it is the source of the solution. Causal claims can be made about things that happened in the past, things that are currently happening, or even things that may happen in the future (which is a lot like a predictive claim).

> *Example:* Our recent jump in sales can be attributed to our the effectiveness of our recent training initiative.
>
> Example: Our turnover rate is high because we don't pay as well as our competitors.

Predictive Claims
A predictive claim is a claim about something happening a certain way in the future. This kind of claim is used to persuade your receiver about the likelihood of a particular outcome. Predictive claims can be made about trends and trajectories (this trajectory will reverse by the end of the year), projections or promises of future performance or behavior (we will complete this step by by the end of the quarter), or even demonstrate *future* causal relationships (if we implement this program, we will have this outcome).

> *Example:* Implementing this new recognition program will improve employee morale.
>
> *Example:* Our start-up company will be successful.

Value Claims
A value claim is a claim about the subjective value of things. This kind of claim is used to influence beliefs and attitudes toward a phenomenon of interest. Value claims can be made about an object's worthiness, fairness, righteousness, desirability, attractiveness, or any other descriptor that can't be directly measured. Value claims can be made about something just by itself (this project is the morally right thing to do) or they can be made by comparison (innovation is more important than predictability).

> *Example:* The proposed remote work policy is unfair.
>
> *Example:* Although this initiative is expensive, it will be worth it to take care of employees.

Evaluative Claims
An evaluative claim is a claim about how something is rated or judged against a standard. This kind of claim is used to persuade your receiver about how well (or how poorly) someone or something compares to expectations. Evaluative claims can be similar to value claims in that sometimes you may evaluate against a subjective standard, but the difference is that with an evaluative claim the focus

is on judging something against a standard. For example, you may use evaluative claims to describe job performance, assess progress towards a goal, or evaluate a completed job.

> *Example:* Maria exceeded expectations for a first-year associate.
>
> *Example:* Our company is not living up to its commitment of being a responsible steward of the environment.

Identify Necessary Claims

Knowing some of the basic claim types available, you can now identify the claims that you will use to support your argument. This task requires critical thinking skills to identify all the key claims that will be needed to support your overall arching position.

Factors such as the complexity of your topic, the size and significance of your request, and the favorability of your receiver, will affect how many supporting claims you need. Frequently, persuasive arguments are supporting with three claims. But that is not a hard and fast rule. There may be times when a single supporting claim will be all that is needed and other times when you will need many more. Your job is to include as many claims as are needed to provide sufficient support for your argument.

Example: Making a recommendation to update the office workspace:

- Teamwork is at an all-time low. [evaluative claim]
- A primary cause of our teamwork problems is our current workspace. [causal claim]
- Redesigning our workspace will enable better teamwork. [predictive claim]

Example: Writing a letter recommending an employee for a promotion:

- Isiah is a hard worker. [evaluative claim]
- Isiah is intelligent. [evaluative claim]
- Isiah is ready for the next level of responsibility. [evaluative claim]
- Isiah is the best candidate for this role. [comparative claim]

Order the Claims

With your claims decided, it it time to order them for maximum impact. There are no specific rules that have to be followed. So the decision is ultimately up to you. But here are two different approaches that could help you decide.

One approach is to order the claims using a logical pattern. Chapter 3 has several suggestions for logical ordering. You can select one of those patterns as you write your claims. For example, you may have to identify a problem before you can present the solution. Or you may have to work in a start-to-finish chronological pattern. Alternatively, you can write your claims first, read them in different orders, and then choose the one that flows the best.

Sometimes your claims won't force you into a particular logical order. For instance, in the example provided above about writing a recommendation letter, the four points could be written in any order and still make perfect sense. When that is the case, you will have a better chance of being successful when you put your most important or compelling points first. The first point made is usually more memorable and the sooner you can move your receiver to a favorable position, the more likely you will be at meeting your persuasive goals.

Communication Tip: **From Topics to Claims**

When it is time to persuade someone, one of the simplest strategies you can use is to make sure you explicitly state every claim. This may sound obvious, but in practice people have a tendency to skip over their claims and either simply announce their general topic or state their evidence.

Below is an example of how a topic can be transformed into a claim through several steps. As you read each one, pause for a moment and consider how much the claim would persuade you if you were the receiver of this message.

Step	Example
1. Identify topic	Isiah's experience
2. State it in a declarative sentence	Below, I summarize Isiah's experience.
3. Take a position	Isiah has accumulated a wide range of experience.
4. Link it to the overall position	Isiah's wide range of experience is a good match for your position.

Support Each Claim with Evidence

You've already learned a lot about how to be evidence-driven in the previous chapter. In addition to those principles, here is more advice about how to apply your evidence-driven competency to persuasive situations.

Be Complete

One of the questions you may be asking yourself is, "how much evidence do I need?" Unlike school assignments where you may have been given a specific number of sources you needed to cite, in business there will not be specific instructions. Instead, you will have to use your judgement to determine if your argument is sufficiently supported.

To make the determination, you should remember the following.

First, claims are inherently debatable statements. So you must start from the standpoint that your receiver will not automatically believe every claim you make. Therefore, each claim you make should have at least one piece of supporting evidence to support its probable truth.

Second, some claims will be more contentious than others. Claims that you identify as higher-stakes or more debatable will likely need stronger evidence. That could come from using higher-quality evidence, from simply using more evidence, or some combination of quality and quantity.

Third, remember that persuading someone requires you to be receiver-centric. That means you should put yourself in the position of your receiver and ask yourself, “Knowing what I know about my receiver, would he or she believe this claim given this evidence?” If you aren’t sure that the answer is yes, you may need to find more evidence.

Be Selective

Sometimes the problem is not having not enough evidence, There may be times that you find you have an abundance of evidence. While it may be tempting to pack as much evidence as you can into your message, that is usually not the most persuasive option. Too much evidence runs the risk of overwhelming your receivers and making them less likely to read your message. A better strategy is to select the strongest one or two best pieces of evidence.

Your Turn: **Building Your Argument**

Go back to the previous scenario, where you intend to propose an employee development program for your company.

Fill out the Supporting Argument Grid below by answering each of the questions below.

1. What are your three main claims? Try to write each one as suggested in

the Communication Tip box above.

2. Can you label each claim with what type of claim it is?
3. What kinds of evidence could you use to support each claim? Which claims would need the most evidence?

	Claim 1	Claim 2	Claim 3
Claim			
Type			
Evidence			

APPLY ADVANCED PERSUASION TECHNIQUES

When you master your ability to set your overarching position and structure your supporting argument, you can apply advanced persuasion techniques to bolster your effectiveness. While there are numerous persuasion theories that can inform your strategy, here we cover three basic approaches that can be used in business writing.

As you get acquainted with each of these approaches, you will see that they rely heavily on being receiver-centric. You will need to know a lot about your receiver to be able to determine your best course of action.

Adjust to Your Receiver's Anchor Point

Persuasion can be hard. Especially when you try to persuade people to believe or do something very different than they are used to, you may find that they are resistant to change. (Chances are, even *you* might be resistant to other communicators' attempts to persuade you.) It's simply part of human nature.

Because of this resistance, sometimes persuasion is most effective when it happens in steps. That is, you might have to engage in several persuasive attempts—with each step advancing your persuasive goal a little further—to get your receiver to adopt your point of view or take action on your proposal.

The question, then, is how do you know when you can go for the full request or if you should take it in steps? **Social Judgement Theory** provides a useful way to think about setting your overarching persuasive position.[1]

1. Social Judgement Theory was developed decades ago by social psychologists Muzafer Sherif and Carl Hovland. You can read more in one of the original publications: Muzafer Sherif

The basic premise of Social Judgement Theory is that every person holds a collection of beliefs and they fall into three zones or "latitudes." The *latitude of acceptance* includes all positions that people find true and reasonable, the *latitude of rejection* includes all positions that people find objectionable, and the *latitude of noncommitment* includes the remaining positions that people are neutral towards. Additionally, every person holds an anchor point, which represents their preferred position along that continuum.

It shouldn't come as a surprise then to learn that if you make a request in someone's latitude of rejection, you likely will be rejected. But if you only forwarded positions in that receiver's latitude of acceptance, you wouldn't really be persuading either. So for the maximum persuasive impact, your goal is to set a persuasion target as close to your target goal as possible but *still within* within your receiver's latitude of noncommitment.

Because anchor points are not set in stone, as you persuade your receiver, his or her anchor points likely will shift. So even though you may not reach your ultimate goal for persuasion in the first attempt, by influencing your receivers' beliefs, you will expand their latitude of acceptance, shift their anchor point, and possibly even shrink their latitude of rejection. See Figure 3.

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and Carl Hovland, *Social Judgment: Assimilation and Contrast Effects in Communication and Attitude Change.* (New Haven, CT: Yale University Press, 1961) or read more

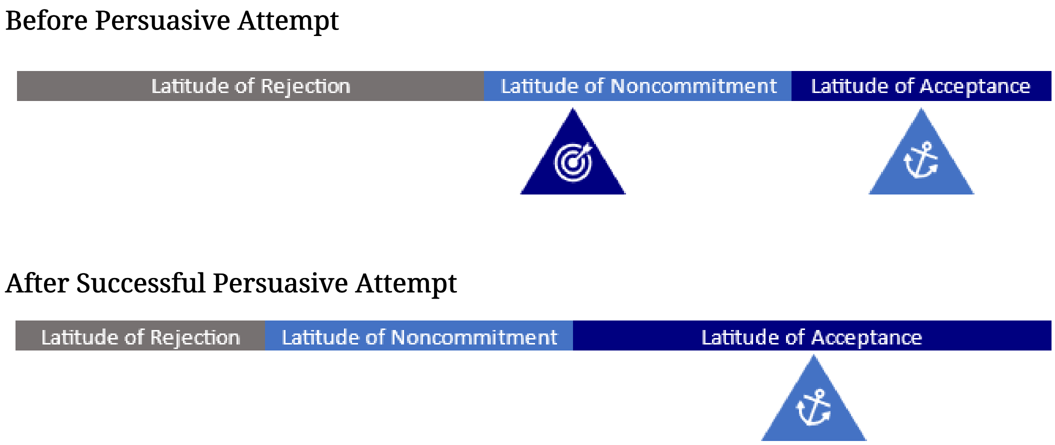

Figure 3. Strategic persuasion involves understanding your receiver's latitudes of acceptance, rejection, and noncommitment. By targeting your instrumental goal within the latitude of noncommitment (versus the latitude of rejection), you will increase your likelihood of being successful in your persuasion attempts. Successful persuasion attempts ultimately can alter the boundaries of your receiver's latitudes and shift anchor points making additional progress possible.

Appeal Differently to Expert and Novice Receivers

Another strategic approach to persuasion involves developing your argument differently depending on whether your receiver is an expert or a novice decision-maker.[2] Communication expert Richard Young explains

2. To be clear, the differentiation between expert and novice receivers is not about intelligent versus not intelligent, or about general experience versus general inexperience. Instead, the differentiation refers to the experience and expertise that people have making particular kinds of decisions. For example, someone who works in human resources is likely an expert at making hiring decisions, but a novice at making decisions about purchasing a new software system. In contrast, someone who works in procurement is likely an expert at making large purchases, but may be more novice at making hiring decisions.

how the knowledge and experience level of your receiver significantly impact how they interpret and act on your messages.[3]

Specifically, **expert decision-makers** are those who are experienced at making a particular kind of decision. Over time, they will have developed **schemas** for decision making. A schema is a mental checklist that includes all the main criteria they will use to make their decision. When faced with persuasive messages, expert decision makers actively evaluate messages for information that addresses each criterion. Then using matrix-thinking, they essentially build a mental image of a table that compares proposals against their schema and possibly other proposals.

Because expert receivers are highly rational and efficient in their approach, the most persuasive messages are those that enable them to make their decision as quickly as possible. In fact, expert receivers can view messages that address irrelevant points as less effective and less persuasive. So to That means that you should make sure that you have a complete understanding of your receiver's decision-making criteria, concisely address all criteria, and exclude any claims about criteria outside the schema.

In contrast, **novice decision-makers** are less experienced at making particular kinds of decisions and likely have not developed a schema. Thus, their approach to decision making may be more emotional, intuitive, or passive. This does not mean that novice decision-makers are unable to make good decisions, but it does mean that it may take longer for them to evaluate available criteria and they may be influenced by a wider range of considerations.

To maximize the effectiveness of a persuasive appeal to a novice decision-maker, you should explicitly identify the criteria that should be used to evaluate your proposal and then to demonstrate how your proposal meets those criteria. Also, knowing that novice decision-makers are more likely to be influenced by multiple considerations, it also will be helpful to address and dispel counter arguments. If you are thinking that all these steps will make persuasive arguments for novice decision-makers longer, you are right.

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3. If you are interested in persuading decision-makers in a variety of business contexts, you can read: Richard Young, *Persuasive Communication: How Audiences Decide*, 2nd ed. (New York, NY: Routledge, 2016)

Balance Logical and Emotional Appeals

A third approach to persuading receivers is to strike the right balance of logical and emotional appeals. the right mix of appeals is dependent upon where your receiver stands on a particular matter. As described earlier, a receiver can be favorable, unfavorable, or neutral. That relative positioning toward your persuasive position will influence which kinds of evidence and claims will be most effective. Communication experts Jo Sprague, Douglas Stuart and David Bodary have provided a good general framework for determining the right mix. See Figure 3.[4]

For favorable receivers, they likely already agree with you—at least in principle. So your task in persuading them is not necessarily to get them believe something, but instead to motivate them act on something that you've said. Therefore, instead of spending a lot of time on logical appeals, you can introduce emotional appeals to intensify your receivers' favorability, to rally their support, or to get them more involved.

But emotional don't always work that way. With unfavorable receivers, emotional appeals likely will decrease your likelihood of success. Because unfavorable receivers are starting from a position opposed to your goal, they need sound logic and strong evidence to be moved. The use of emotional appeals will likely be viewed as a weak attempt to persuade, a lack of credible evidence, or possibly even an attempt to manipulate. So for unfavorable audiences, it is better to stick to facts and logic.

For neutral receivers, chances are that you will need a mix of logical and emotional appeals. But the right mix will depend upon whether your receivers are neutral because they are undecided, uniformed, or simply uninterested. Undecided and uninformed receivers should be presented with a full case of evidence that presents all sides of the argument and is heavily geared to logic. Uninterested receivers will also need a lot of logical appeals, but introducing some emotional appeals may help motivate them to care about your appeal.

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4. The framework for balancing logical and emotional appeals was originally developed for persuasive public speaking. But the basic principles hold whether speaking or writing. For more information, see Jo Sprague, Douglas Stuart, and David Bodary, *The Speaker's Handbook*, 12th ed. (Boston, MA: Cengage, 2019)

Logic	Logic and Emotion	Emotion

Communication Tip: **Communicate with Confidence**

When it comes to persuasion, how you say something can be just as important as what you say. In particular, communicating confidently and and passionately sends subtle cues to your receiver that help you be more persuasive. Below are some tips for how to communicate with confidence.

Strike Tentative Clauses

Tentative clauses includes anything that (unintentionally) signals uncertainty or a lack of confidence. It can include expressions like, “I believe,” “I think,” and “In my opinion.” When people read tentative clauses, they get a subtle signal that the communicator isn’t completely sure. That in turn, can lead them to be less confident in the claim as well. So check your messages for tentative clauses and then eliminate them.

> *Example:* I think this will be best option for the company.
>
> *Improved:* This will be the best option for the company.

Trim Empty Hedges

Hedges are words that are used to exercise caution or make a statement less forceful. Sometimes using hedges is necessary and ethical in persuasion, such as when you are being honest and accurate about a relationship. For example, there is a difference between saying something *will* happen versus something *might* happen. But sometimes hedges slip into writing unintentionally.

So be on the look out for words that minimize your certainty: maybe, perhaps, possibly, sometimes, fairly, usually, might, could, actually and other similar words. Each time you see one of those words, read your sentence carefully. Is the hedge necessary to convey the truth? Then keep it in. Is it there as a filler word? Then strike it or replace it with a stronger word.

> *Example:* Implementing these three cost-savings measures maybe could save us $1 million annually.
>
> *Improved:* Implementing these three cost-savings measures is projected to save us $1 million annually.

Express Your Passion

It usually is easier for receivers to evaluate a communicator's passion in when they are speaking rather than writing, as they can rely on tone of voice, body language, and other nonverbal cues. But you can demonstrate passion in your writing, too. One way to do it is to explicitly state that you are passionate. Expressions like, "I care deeply about this issue," or "This matter is important to me" directly communicate your passion. You can even share a concise story about why you are passionate. Of course, you should reserve expressions of passion for when you genuinely are passionate.

> *Example:* This new employee wellness program will enable us to build a healthier and happier workforce.
>
> *Improved:* We are passionate about this new employee wellness program, which will enable us to build a healthier and happier workforce.

Avoid Exclamation Points

Be careful using exclamation points in business contexts. While exclamation points might help you convey your enthusiasm in personal communication, using them in business can backfire and raise questions about your seriousness. When it comes to persuasion, it usually is best to leave out all exclamation points.

> ***Example:*** Our software platform is easy to use!!!
>
> ***Improved:*** Our software platform is easy to use.

STRIVE FOR FALLACY-FREE PERSUASION

When it comes to persuasion, there is something to beware of: fallacies. Fallacy is a term that refers faulty reasoning. You can think of these as breakdowns, holes, or problems in your argument. They sometimes come in the form of presenting irrelevant evidence to support claims, making “leaps” in reasoning that defy logic, and basing arguments on invalid assumptions, to name a few.

Sometimes fallacies occur *intentionally*. In the worst cases, unethical influencers use fallacies to manipulate or deceive the receiver. Certainly, intentional use of fallacies violates persuasion ethics, which destroys the credibility of the communicator and undermines relationships.

But most often, fallacies occur *unintentionally*. Perhaps you lack strong evidence to support a claim and you stretch just a little too far in trying to make a case. Perhaps you might not have structured your argument and supporting evidence carefully enough and the result is that your evidence doesn’t quite match your claims. Perhaps you are so passionate for your position that you let yourself get carried away and claim more than the evidence truly supports. Even when fallacies are unintended, they still can be harmful, as they can undermine the strength of your overall persuasive argument and raise concerns with your trustworthiness as a communicator.

In this section, you will learn how to deal with fallacies in persuasion.

Spot Common Fallacies

The first step of dealing with fallacies is to learn how to spot them. Spotting and correcting fallacies in your own writing will strengthen your skill as a persuasive communicator. Additionally, learning to identify fallacies also will make you a more savvy receiver who can spot other people’s errors in reasoning. There are numerous types of fallacies. Here are some of the most common ones you may see in business communication messages.

Ad Hominem

The ad hominem (Latin for "to man") fallacy is one in which someone attacks the *person* holding an opposing view rather than engaging with the substance of the argument. You can spot ad hominem attacks whenever an individual or even a group of individuals is insulted or name-called. You might even spot ad hominem attacks by frequent use of the words "they," "you," or "you people."

> ***Example:*** When persuading others to vote no on an initiative proposed by Joe: "Joe hasn't had a good idea yet" or "Of course Joe would say that. He would do anything to avoid hard work."
>
> ***Instead:*** Focus on the merits and limitations of claims, arguments, and evidence, not on the person presenting them.

Bandwagon

The bandwagon fallacy is based on popularity: If many people like something or do something, it must be proper, effective, safe, etc. While popularity has a role in some business decisions (for example, the popularity of a product may be important for projecting future sales), it should not be used to support all claims or as a substitute for other kinds of evidence. You can spot bandwagon appeals when communicators cite things like "most people," "everyone," or even present results of opinion polls.

> ***Example:*** Deploying an artificial intelligence assistant to handle our customer service calls is a savvy business decision because all our competitors are doing it.
>
> ***Instead:*** Base your decisions and arguments on how the idea applies to your specific and unique situation, not on what others are doing or thinking.

False Dilemma

The false dilemma fallacy occurs when receivers are presented with a simplified black-and-white choice between two positions that eliminates consideration of other middle ground positions. You can spot false dilemma fallacies by looking for “either/or” wording. You might also be able to spot this fallacy if you can think of other reasonable options than those that are presented.

> ***Example:*** We can either focus on reducing costs or we can prioritize sustainable sourcing.
>
> ***Instead:*** When possible, explain the different options available and demonstrate that your recommendation is the best of all options. When there are too many different options to cover, be explicit that you are presenting only a few options but that other options are available.

Slippery Slope

The slippery slope fallacy is one in which the worst possible outcome is presented as the inevitable conclusion to taking a particular first step. It essentially denies the potentially complex sequence of steps and decisions that would have to be made to arrive at a particular conclusion. You can spot this fallacy by looking for “if/then” wording followed by an extreme logical leap. Sometimes people will inadvertently alert you to this fallacy by prefacing their comments by saying, “It’s a slippery slope to . . .” While they may think they are warning you of inevitable negative outcomes, they are simultaneously pointing out their own fallacious reasoning.

> ***Example:*** If we don’t adopt a remote work policy, we will be left with zero employees just in time for our busy season.
>
> ***Instead:*** Focus your argument on realistic immediate and long-term consequences of the decision. Describe each step between the initial decision and the projected outcome and provide evidence to support those steps.

False Cause

The false cause fallacy (or sometimes referred to as a correlation/causation fallacy) occurs when someone attempts to show that one phenomenon caused something else to happen without sufficient proof. Sometimes evidence may show that two things happened at the same time, or even that one followed the other. But just because two things are related, it doesn't mean that one caused the other.

The false cause fallacy can be one of the most difficult to spot because it relies on close evaluation of evidence and strong critical thinking. You might ask, does this causal relationship make sense? Are there other phenomena that might have caused it? Does this causal relationship occur at other times or under other conditions?

> *Example:* Our sales have dropped because of our competitor's new advertising campaign.
>
> *Instead:* Claim causation only after careful analysis of the evidence. Evaluate other plausible conditions. Rule out other conditions. You also can be explicit that even though there is a correlational relationship, it may or may not indicate causation.

Strawman

The strawman fallacy happens when someone distorts the opposing position in order to make it easy to refute. Someone using a strawman argument might mischaracterize, oversimplify, or exaggerate the opposing position. Then after "winning" the easier argument, they consider the original argument decided. To spot this fallacy, you have to use your critical thinking and pay careful attention to any shift in the argument.

> *Example:* When faced with a proposition to expand into a new international market: Abandoning our local market and gambling on untested foreign markets is a recipe for disaster. (The original proposal was for expansion, not for changing markets entirely.)
>
> *Instead:* Make the effort to understand opposing positions, then present them fairly and honestly. Debate the matter at hand, even if it is difficult to do so.

Your Turn: **Spot the Fallacies**

Unfortunately, fallacies are all around you. One of the best ways to build your fallacy-spotting skills is with practice. Look online to find any social media forum where people are arguing about something. It can be a discussion forum on Facebook, Nextdoor, your local newspaper, or any other app or website with long threads of comments. Fallacies can be generated for nearly any topic. You don't even have to seek anything overtly political or sensitive to find a passionate exchange. Sometimes even conversations about trees and pets are enough to trigger debate.

Pick a thread and see how many fallacies you can spot.

Questions to Ponder

1. Which fallacies did you see the most?

2. How did people respond to the fallacies? Did they notice the fallacies? Did fallacies trigger different kinds of responses?

3. How could similar positions be advocated without fallacies?

Admit and Fix

Despite your best efforts, there will be times when fallacies will find their way into your arguments. When that happens, you will need a plan to respond.

As described above, most of the time fallacies are introduced unintentionally. But that doesn't mean that your receiver will automatically will assume that your fallacy was unintentional. When fallacies appear in your argument, you run this risk of your receiver thinking that you intended to manipulate or deceive. So the most important thing you can do is to restore trust and credibility immediately.

Therefore, when you receiver spots a fallacy, the best approach is to admit your mistake and fix it. Admitting your mistake could be as simple as saying, “You’re right, that doesn’t work,” “I agree, that doesn’t really follow” or “I see what you’re saying.” Fixing your fallacies could involve any of a number of different strategies. For example, you could provide *better evidence* that directly supports your claim; *adjust your claim* to match the evidence; *drop your claim* if sufficient evidence does not exist; or *concede your point* if there is sufficient evidence to the contrary.

Making an effort to admit and fix your mistakes will go a long way to retaining and/or restoring your credibility with your receiver.

PUTTING IT INTO PRACTICE

In this chapter you have learned that persuasive communicators set top-level strategy, structure their arguments, and sometimes even apply advanced persuasion techniques, all while keeping their appeals ethical and fallacy-free. You should be ready now to begin practicing and applying the persuasive competency.

You will have opportunities every day in business to influence how other people around you think, act, and make decisions. In this section, you will find strategies for writing two persuasive messages in business: request for funds and the “one-pager” proposal.

Message Strategy: Requesting Funds

There will be times when you will want to request money to support something you are doing, whether it is personal professional development or for organization- or team-based initiatives. Your receiver—the person who has the authority to approve or deny requests—likely has limited resources and has to use them carefully throughout the budget cycle. So a request for funds must be highly persuasive. To get your receiver to say yes, you have to make a compelling case that their will be a good return on investment.

Here are tips for writing a request for funds:

Ask for What You Need

Before your receiver can agree to your request for funds, he or she needs to know how much you are requesting. Even though it may feel awkward to do so, it is important that you ask explicitly for what you need. If there are multiple expenses within a single request, it is helpful to identify the price of each item. (Hint: Sometimes, you might not be able to get full funding, but you could get partial funding and the line-item budget will help.)

Provide a Solid Justification

Your receiver likely is going to be asking, “Is this a good use of our financial resources?” Any request for funds needs solid justification if your receiver is going to approve it. You can identify a problem that will be solved, benefits, risks of not approving the request, or some combination.

Identify What’s In It for Them

Usually when presenting a request for funds, you are doing so because there is a benefit to you. But your personal benefit likely won’t be very compelling to your receiver. So focus on the advantages that will accrue to your receiver or your organization. If you can show that your receiver will benefit, you will increase the likelihood of getting approved.

Be Gracious

Keep in mind that in most organizations, money is scarce and that decisions for funding have to be made very carefully. Thank you receiver for considering your request. Then, regardless of whether the answer is yes or no, thank them again.

SAMPLE REQUEST FOR FUNDS

TO:	martin.okeefe@cardinal.com
SUBJECT:	Request for Approval for PMP Certification

Martin,

I am writing to request your approval and support for seeking certification as a Project Management Professional (PMP) from the Project Management Institute (PMI).

My job responsibilities have expanded recently to include more project management. As you know, I have managed several smaller projects over the past two years. But following Katie Jones's resignation, I have been tasked with several larger projects, including managing the rollout of our website redesign and the customer service improvement initiative.

While I have developed basic project management skills on the job, PMP certification will equip me with advanced knowledge, skills, and tools necessary to lead complex projects effectively and efficiently. PMP training covers subjects such as risk management, resource optimization, and quality control.

With PMP certification, I will be better positioned to deliver successful execution of projects, improved project outcomes, and enhanced stakeholder satisfaction. I also am committed to being a resource for others in the organization. Additionally, PMP certification is widely recognized and respected in industry, which will add to my credibility as a trusted resource.

The PMP certification process involves several components, including formal training, test preparation, and the certification exam. In total, the training, testing, and related expenses total **$2,734**. Here is a breakdown of the expenses and support requested:

> **PMP Certification Training ($2,000).** To be eligible to take the exam, I must complete 35 hours of training. City University offers an in-person course that provides comprehensive coverage of the Project Management Body of Knowledge (PMBOK). Their

website reports that more than 90% of the people who have taken this course are now PMP-certified.

PMP Test Prep App ($80). To increase my chances of passing the PMP exam on the first attempt, I would like to access the PMP Test Prep App. This app offers practice exams, study materials, and guidance on exam strategies.

PMP Exam Fee ($405 with PMI membership or $550 without PMI membership). The PMP exam is required for certification and the price is set by PMI.

PMI Membership ($149 per year). Membership in PMI will give me access to research, best practices, and new trends in project management so I can continue developing my skills.

Books and Materials ($100). I would like to request a small allowance for purchasing books and other recommended materials to prepare me for the exam.

Release Time. Additionally, as the training course is a 35-hour commitment, I am requesting your approval for time off to attend the training.

Typically PMP certification takes 8-12 weeks. So I anticipate completing my coursework and testing by the end of the fiscal year.

I realize that this is a big ask. But I hope you agree that this investment in my professional development will yield long-term benefits for our team and the organization. Of course, I would be happy to provide additional information or answer any questions you may have.

Thank you for considering my request.

Sincerely,

Tori Shea
Marketing Manager | Cardinal Co.
1798 Market Street
Hometown, KY 40200
tori.shea@cardinal.com
(502) 555-9147

Message Strategy: Proposing an Idea

Another kind of persuasive appeal common in business is proposing new ideas. Especially when a new idea is big or complex, there can be a lot to for a decision-maker to consider. So it is helpful to have a proposal in writing. But at the same time, it probably isn't a good use of your receiver's time to read a full-blown, lengthy feasibility report. It probably isn't a good use of your time to write one until there is agreement that the basic idea is a good one.

Therefore, decision-makers will sometimes tell employees pitching good ideas to "give me a one-pager." A one-pager is a clear and concise proposal contained on a single sheet of paper or single presentation slide. It is a document that is easy to read, understand, and share. It also can be a tool to get initial buy-in for proceeding with a more complete proposal.

Here are tips for writing a request for writing one-pagers:

Use a Template

Templates are preformatted documents specifically designed to accomplish a goal. Finding a good template will save you a lot of time designing and formatting the document. Chances are, it also will make your one-page look more professional. There are dozens of different templates for one-pagers online. Some companies even have their own preferred templates.[1]

Write an Assertion-Style Title

The title of your proposal one-pager should be written as an assertion. (See the Putting it into Practice section of the Evidence-Driven chapter if you need a reminder). The title should make the major persuasive argument of your proposal.

Provide a High-Level Summary

A one-page needs to be concise. So summarize your supporting claims and the most important evidence that support those claims. This can usually be done with a bulleted list or very short paragraphs of one or two sentences each.

Visualize Your Most Powerful Evidence

People's eyes are drawn to images. So highlight your most powerful evidence visually. Ask yourself, "What is my most persuasive evidence?" and "What will be most likely to influence my receiver?" Usually, a well-designed chart or graph is most persuasive. But occasionally, a photograph or block quotation might be even better. Whatever visual evidence you choose, help your receiver interpret it correctly by writing detailed, persuasive captions that advance your argument.

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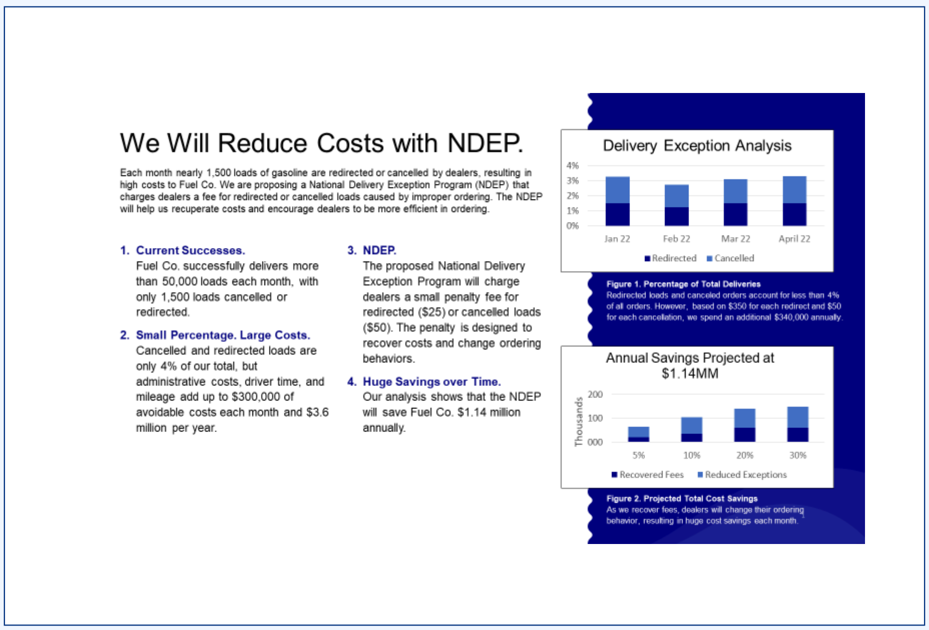
1. If you want access to templates, you can find one-pager templates from *Evergreen Data* at https://stephanieevergreen.com/slidedocs-slide-handouts-and-one-pagers and from *Duarte* at https://www.duarte.com/resources/guides-tools/slidedocs-templates/. Both of these firms provide expert guidance on data visualization and have served clients in Silicon Valley.

Cut the Clutter

Your persuasive title and your persuasive visualization will likely be the most visible things on the page, and the ones the receiver will use to form their initial impression. So it is important that you do not obscure that message with clutter. You want your document to look attractive and professional. With only one page, that means there isn't room for extraneous information. Make sure that everything you use, including graphics, contributes meaningfully to your message.

SAMPLE PROPOSAL ONE-PAGER



We Will Reduce Costs with NDEP.

Each month nearly 1,500 loads of gasoline are redirected or cancelled by dealers, resulting in high costs to Fuel Co. We are proposing a National Delivery Exception Program (NDEP) that charges dealers a fee for redirected or cancelled loads caused by improper ordering. The NDEP will help us recuperate costs and encourage dealers to be more efficient in ordering.

1. **Current Successes.** Fuel Co. successfully delivers more than 50,000 loads each month, with only 1,500 loads cancelled or redirected.
2. **Small Percentage. Large Costs.** Cancelled and redirected loads are only 4% of our total, but administrative costs, driver time, and mileage add up to $300,000 of avoidable costs each month and $3.6 million per year.
3. **NDEP.** The proposed National Delivery Exception Program will charge dealers a small penalty fee for redirected ($25) or cancelled loads ($50). The penalty is designed to recover costs and change ordering behaviors.
4. **Huge Savings over Time.** Our analysis shows that the NDEP will save Fuel Co. $1.14 million annually.

Figure 1. Percentage of Total Deliveries
Redirected loads and canceled orders account for less than 4% of all orders. However, based on $350 for each redirect and $50 for each cancellation, we spend an additional $340,000 annually.

Figure 2. Projected Total Cost Savings
As we recover fees, dealers will change their ordering behavior, resulting in huge cost savings each month.

AFTERWORD: COMMUNICATING COMPETENTLY AND CONFIDENTLY

Throughout this book, you have learned a lot about the five core competencies of business communication: professional, clear, concise, evidence-driven, and persuasive. You have learned why each is important and practiced big-picture strategies and hands-on techniques for achieving each one. All of this learning has helped prepare you to face communication challenges in your professional life.

By now, you should be able to handle many of the basic day-to-day business communication challenges with relative ease and tackle some of the more difficult ones with sustained effort. Of course, there also will be times that you encounter complex communication challenges that may seem insurmountable. When that happens, your confidence may be shaken. But we want you to remember that you already have many of the tools necessary to meet even the toughest challenges.

At the core, you can rely on your guiding framework for approaching business communication. You know that you can start by asking yourself questions about your three goals: What do I want to achieve? What kind of relationship do I have with my receiver and what kind of relationship do I want? What kind of identity do I want to convey for myself? Then with your goals in mind, you can ask questions about your receiver: What does my receiver need to know? What are our relational dynamics? What does my receiver think about my position? By being goals-oriented and receiver-centric, you can build a "big picture" plan.

Then as you begin putting your message into writing, you can continue to apply your framework, examining your message and asking these questions: Am I being professional? Clear? Concise? Evidence-Driven? Persuasive? You might even make adjustments to better align with each of the competencies. When you answer "yes" to each of the competency questions, you can be confident that you are sending a highly competent message that will reflect well on you.

By reading this book (and by completing your business communication course, of course) you have made important progress in building a foundation of strong communication skills that will serve you well throughout your professional career. We hope that you recognize the great strides you have made in developing your communication competence and that you have built confidence in your ability to meet business communication challenges for years to come.

ABOUT THE AUTHORS

Kristen Lucas (Ph.D., Purdue University) is an associate professor in the College of Business at University of Louisville. She led the development of the competency-based business communication approach and has published pedagogical articles about it in *BizEd Magazine* and *Business and Professional Communication Quarterly*. In 2019, she was named the Meada Gibbs Outstanding Teacher-Scholar by the Association for Business Communication.

In addition to teaching business communication, Kristen is an active researcher. She has published more than 40 scholarly articles and chapters on workplace dignity, organizational discourse, and business communication. Her work appears in outlets such as *Organization Studies, Journal of Management Studies,* and *Journal of Business Ethics.*

Jacob D. Rawlins (Ph.D., Iowa State University) is an associate professor in the Linguistics department at Brigham Young University. Prior to joining the faculty at BYU, he helped develop the competency-based curriculum for the business communication courses at the University of Louisville, and he continues to use that approach in his editing and publishing courses at BYU.

Jacob's research focuses on applications of rhetorical theory in the workplace, professional communication pedagogy, and interactive data visualizations. He has published in *Business and Professional Communication Quarterly*, *Technical Communication Quarterly*, and *IEEE Transactions on Professional Communication.*

Jenna Haugen (Ph.D., University of Kansas) is a clinical associate professor in the Kenan-Flagler Business School at University of North Carolina at Chapel Hill. With expertise in business and professional communication, Jenna focuses on rhetorical strategies used to communicate with organizational stakeholders, identity crafting, and newcomer socialization. She is an active member of the Association for Business Communication and the National Communication Association.

FOR INSTRUCTORS

The competency-based approach to teaching business communication was developed by Kristen Lucas, Jacob D. Rawlins, and Jenna Haugen at the University of Louisville. The approach is based on the premise that all business communication is goals-oriented and receiver-centric. Then, through a scaffolded pedagogical approach, students learn the building blocks of communication competency that transcend specific communication contexts and genres. This approach gives students tangible and translatable skills that build their confidence for communicating in business.

You can read more about the approach in *BizEd Magazine* and *Business and Professional Communication Quarterly*.

If you are interested in implementing the competency-based approach in your business communication courses, please reach out to Kristen Lucas at kristen.lucas@louisville.edu. Verified instructors can get access to free teaching materials including sample syllabi, course assignments, instructional slide decks, and grading rubrics.

GLOSSARY

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appeal to action

a persuasive appeal which encourages someone to take an immediate action

argument of fact

a persuasive position that argues for something that is or will be

argument of value

a persuasive appeal that takes a subjective position based on what should (or should not) be valued

care

an element of the professional competency, which refers to your ability to present yourself without mistakes, sloppiness, or other detractors

cherry picking

a type of manipulation in which an unethical influencer presents selective evidence instead of representative evidence

claim

a debatable statement that you attempt to make other people accept or understand (same as "point")

clustering

grouping items into categories based on shared characteristics

coercion

a broad category of unethical influence techniques that use power to limit or eliminate the receiver's decision-making agency conventionality

an element of the professional competency, which refers to the ability to conform to professional expectations and standards (format, style, etc.)

courtesy

a component of the professional competency, which refers to your ability to adhere to standards of etiquette, to behave civilly, and to demonstrate tact and emotional control

deception

a broad category of unethical influence techniques that use false claims and evidence to induce agreement

evidence

the material used to support the probable truth of claims

expert decision-makers

experienced decision-makers who have developed and use schemas for decision making

fabrication

a type of deception in which an unethical influencer manufactures false evidence that is presented as true

falsification

a type of deception in which an unethical influencer says something patently untrue

gatekeeping

a function in business of determining who or what gets in and who or what is kept out identity

one of three meanings carried by a message; it concerns a sense of who someone is and how he or she is perceived by others

instrumental

one of three meanings carried by a message; it is the purpose or use of a message and what should be accomplished as a result of communicating

intimidation

a type of coercion in which an unethical influencer induces agreement by exploiting the receiver's vulnerabilties

manipulation

a broad category of unethical influence techniques that distort the truth to induce agreement

misrepresentation

a type of manipulation in which an unethical influencer presents information in an unclear way so receivers have a difficult time verifying the truth

novice decision-maker

a less experienced decision-maker who tends to rely on emotion, intuition, and/or passive information seeking to make a decision

omission

a type of deception in which an unethical influencer intentionally excludes relevant negative information

overarching persuasive position

a persuasive message strategy that combines an instrumental goal and a broad persuasive message type parallel structure

using similar words, parts of speech, verb forms, or other elements to create cohesion

persuasion

the act of motivating a receiver through communication to change a particular belief or behavior

point

see "claim"

probable truth

the likely truth, credibility, and believability of a claim

promises

a type of coercion in which an unethical influencer offers to give something of value in exchange for agreement

receiver

a specific person or group of people to whom a message is directed and who can act upon the message

recommendation

a persuasive position that involves directly advocating for (or against) a formal course of action

relational

one of three meanings carried by a message; it concerns the connection or relationship between two or more people or parties

relational dynamics

the elements that characterize your relationship with the receiver; it includes power distance, familiarity, formality, and other indicators of relationship quality request

a persuasive appeal which involves formally asking for a particular outcome

sans serif

translating to "without serifs," it refers to any typeface or font face that does not have serifs

schema

a mental checklist of the criteria used to make a particular decision

serif

a small line or stroke that extends at the ends of letters or numbers. Sometimes serifs are described as "feet" of letters in certain typefaces

social judgement theory

a theory developed by social psychologists Muzafer Sherif and Carl Hovland that explains attitude change processes

threats

a type of coercion in which an unethical influencer states or implies an intention to follow-up with negative action if a decision-maker does not make the desired decision