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BUSINESS COMMUNICATION

for the 3rd year students
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Preface to Second Edition

Effective communication skills are recognized as the number one skill desired by employers. This course focuses on the basics of business writing, starting with the fundamentals and understanding your audience. This course combines discussion boards and exercises to focus on core skills in a collaborative and dynamic environment. Students focus on real world applications of effective writing strategies to reduce miscommunication and increase efficiency of their messages.

The second edition has updated a large number of business communication, especially in the field of equal opportunities, how to develop effective messages and think creatively. Many new cases and examples of research have been added. In addition, these introductory classes help prepare students for study at a Master school by developing their skills in briefing cases, course outlining and taking examinations.

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INTRODUTION

Business has become truly global and the electronic age has made possible instantaneous communication. The ability to keep up with these changes and to understand them defines our success as business professionals. But communication is so much more than just the spoken or written word. At its best it is a multifaceted process through which we exchange information with the world around us. We use communication skills in every aspect of our lives: at work, with family and friends, even with ourselves.

Quality communication requires intensive listening to the needs and views of those we work with. Sales representatives must listen to their clients, doctors must listen to their patients, and businesses must listen to the changing needs of the marketplaces in which they compete.

Communication is enhanced when it is coupled with an ability to perceive the impact of our actions and words. Great communicators have an interactive style. Armed with clear, well-defined goals for what is to be accomplished, they tailor their communication to the audience or situation at hand. They are able to connect in such a way as to promote true two-way exchanges. Only through this process can we realize the full potential of professional growth and success and fulfill the potential of cultural diversity.

True leadership is not conferred by title or position; it is earned through personal and professional achievements and the ability to motivate those around you. Think of those great teachers you have had and how they really motivated you to learn; think of bosses whom you felt really understood and respected the contributions you made. Leadership relies, above all else, on effective communication skills. This book will walk you through all the tools you need to become great communicators and true leaders. Practice these skills and make them a part of everyday life, and professional success and leadership will surely follow.

1. The Building Blocks of Effective Messages

Business depends on communication. People must communicate to plan products; hire, train, and motivate workers; coordinate manufacturing and delivery; persuade customers to buy; and bill them for the sale. Indeed, for many businesses and nonprofit and government organizations, the "product" is information or services rather than something tangible. Information and services are created and delivered by communication. In every organization, communication is the way people get their points across and get work done.

Communication takes many forms: face-to-face or phone conversation, informal meetings, e-mail messages, letters, memos, and reports. All of these methods are forms of **verbal communication,** or communication that uses words. **Nonverbal communication** does not use words. Pictures, computer graphics, and company logos are nonverbal. Interpersonal nonverbal signals include smiles, who sits where at a meeting, the size of an office, and how long someone keeps a visitor waiting.

Communication Ability = Promotability

Even in your first job, you'll communicate. You'll read information; you'll listen to instructions; you'll ask questions; you may solve problems with other workers in teams. In a manufacturing company, hourly workers travel to a potential customer to make oral sales presentations. In an insurance company, clerks answer customers' letters. Even "entry-level" jobs require high-level skills in reasoning, mathematics, and communicating. As a result, communication ability ranked first among the qualities that employers look for in college graduates.

Many employers complain that nobody who works for them can write a simple paragraph. Paul Goodman, Vice President and Senior Recruiter at Citigroup, says strong writing skills are a "tiebreaker" in deciding whom to hire:

If I have two job candidates in front of me, equally qualified except that one can write well and the other can't, I'll hire the one who can—every time.

Communication becomes even more important as you advance. Annette Gregorich, Vice President of Human Resources for Multiple Zones International, says, I've actually seen people lose promotions because they couldn't write a proposal or stand in front of the management team and make a presentation.

As a result, good writers earn more. Linguist Stephen Reder has found that among people with two- or four-year degrees, workers in the top 20% of writing ability earn, on average, more than three times as much as workers whose writing falls into the worst 20%.

"I'll Never Have to Write Because..."

Some students think that a secretary will do their writing, that they can use form letters if they do have to write, that only technical skills matter, or that they'll call rather than write. Each of these claims is fundamentally flawed.

Claim 1: "Secretaries Will Do All My Writing."

Downsizing and voice mail have cut support staffs from 10 to 30% nationwide. Of the secretaries who remain, 71% are administrative assistants whose duties are managerial, not clerical." As a result, most workers in business and government today draft and revise their own letters, memos, and reports at desktop computers or terminals. You'll be responsible for correct spelling, mechanics, and format as well as organization, logic, audience analysis, and tone.

Claim 2: "I'll Use Form Letters When I Need to Write."

A form letter is a prewritten fill-in-the-blank letter designed to fit standard situations. The writer can personalize a form letter by having it individually typed with the recipient's name and address. Sometimes form letters have several different paragraphs from which the writer can choose, depending on the circumstances. Using a form letter is OK if it's a good letter, but some of the letters currently in use are dreadful.

Even good form letters cover only routine situations. The higher you rise in your organization, the more frequently you'll face situations that aren't routine, that demand creative solutions. If you develop the skills necessary for good writing and original thinking, you're far more likely to realize your potential and reach your career goals.

Claim 3: "I'm Being Hired as an Accountant, Not a Writer."

Your technical skill in accounting or computer science or marketing may get you your first job. The ability to speak and write effectively may help you keep it. The inability to write is the main reason that Big Five accounting firms fire new hires. Written communication is crucial to accounting. Dee Castner, Senior Auditor at KPMG, explains,

We write to clients to communicate the necessities and timeliness of audits. We write to apprise the audit team of internal and external situations. We document in writing the evidence which supports an audit opinion.

Almost every entry-level professional or managerial job requires you to write e-mail messages, speak to small groups, and write some paper documents. Many people in business and government routinely write from 10 pages of letters and memos a week to, in some cases, 20 to 30 pages a day. And that doesn't count the dozens of e-mail messages workers write and receive. The Air Force estimates that it produces 500 million pages of writing a year. First-level supervisors in one manufacturing plant spend 25% of their time writing. Most professionals find that the higher they go, the more they write. Margot Northey found that 80% of the partners in the Big Five accounting firms wrote memos every day; 67% wrote reports or notes to a financial statement and 93% wrote letters to clients *at least* once a week.

Claim 4: "I'll Just Pick Up the Phone."

Most people in organizations say they spend more time talking and listening than they do reading and writing. But no organization depends exclusively on oral communication. People in organizations put things in writing to make themselves visible, to create a record, to convey complex data, to make things convenient for the reader, to save money, and to convey their own messages more effectively.

"If it isn't in writing," says a manager at one company, "it didn't happen." Writing is an essential way to make yourself visible, to let your accomplishments be known.

Written memos and reports document what was said and done and the reasons for decisions. Carefully written memos and reports enable a company to use its earlier experience without having to reinvent the wheel every time a new set of people tackles a recurring problem. Written documents also allow individuals and companies to protect themselves. If there is no written record, chaos—and expensive lawsuits—may result.

Written channels (including graphics) are better than oral ones for conveying numbers and complex information. Written channels are less expensive than oral ones for reaching large groups of people or transmitting information over long distances. Writing may also be more convenient for the recipient. To talk, both people must be free at the same time. This is rarely the case in business. Only 12% of business phone calls find the intended receiver in the office on the first try. When you send a letter or memo, the recipient can read it when it's most convenient. Even more important, the reader can proceed at a convenient pace, skimming easier or less important sections and rereading difficult or key sections. Written documents become even more important in international business. Talking on the phone requires immediate comprehension. Reading a fax or e-mail message is easier for a manager doing business in a language other than his or her native language.

Finally, putting a message in writing makes it easier to present your ideas in the most effective way, even in difficult situations. We've all had the experience of fumbling for words, only to think of the perfect words to make a point after it was all over. Writing, because it can be revised, gives us the second chance we may need to achieve the effect we want.

2. The Managerial Functions of Communication

According to Henry Mintzberg, management have three basic jobs: to collect and convey information, to make decisions, and to promote interpersonal unity· Every one of those jobs is carried out through communication. Managers collect relevant information from conversations, the grapevine, phone calls, memos, reports, databases, and the Internet. They convey information and decisions to other people inside or outside the organization through meetings, speeches, press releases, videos, memos, letters, and reports. Managers motivate organizational members in speeches, memos, conversations at lunch and over coffee, bulletin boards, and through "management by walking around."

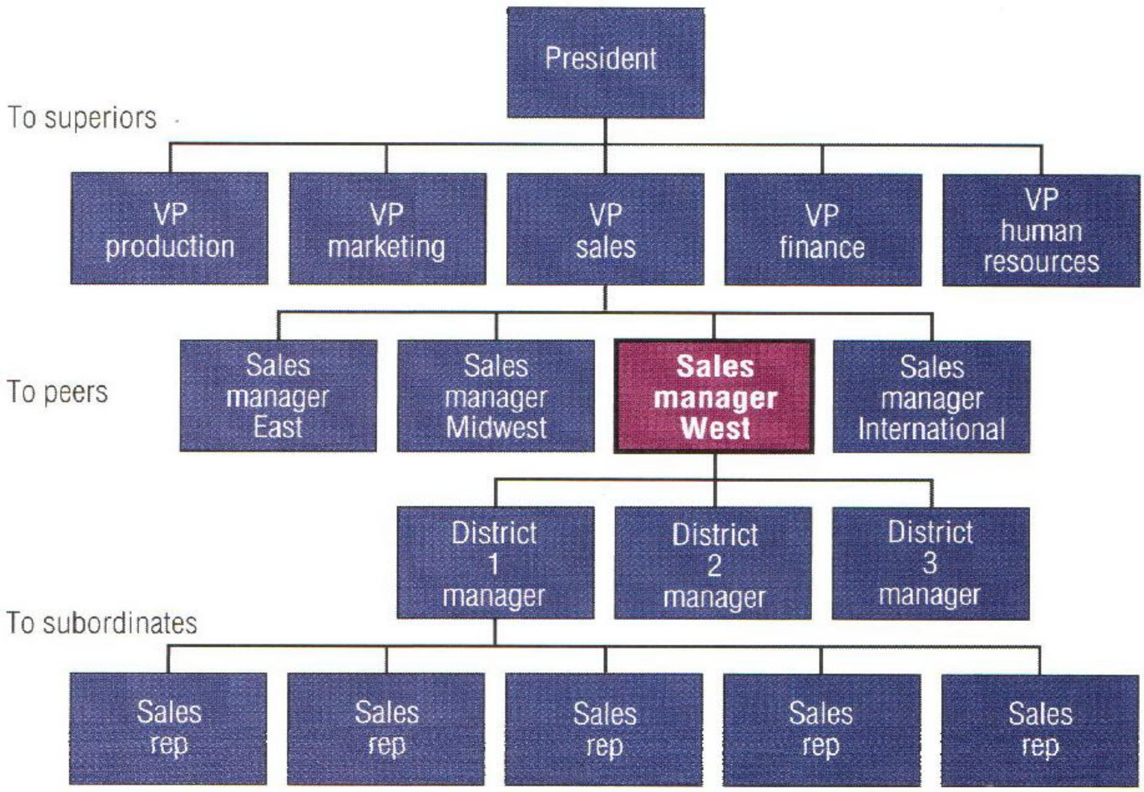


Figure 1.1 – The internal audiences of the sales manager

Effective managers are able to use a wide variety of media and strategies to communicate. They know how to interpret comments from informal channels such as the company grapevine; they can speak effectively in small groups and in formal presentations; they write well.

Communication—oral, nonverbal, and written—goes to both internal and external audiences. **Internal audiences (**Figure 1.1**)** are other people in the same organization: subordinates, superiors, peers. **External audiences** (Figure 1.2) are people outside the organization: customers, suppliers, unions, stockholders, potential employees, government agencies, the press, and the general public.

Figure 1.2 – The corporatio’s external audiences

The Importance of Listening, Speaking, and Interpersonal Communication

Informal listening, speaking, and working in groups are just as important as writing formal documents and giving formal oral presentations. As a newcomer in an organization, you'll need to listen to others both to find out what you're supposed to do and to learn about the organization's values and culture. Informal chitchat, both about yesterday's game and about what's happening at work, connects you to the grapevine, an informal source of company information. You may be asked to speak to small groups, either inside or outside your organization. Networking with others in your office and in town and working with others in workgroups will be crucial to your success.

These skills remain important as you climb the corporate ladder. In fact, a study of 15 executives judged good performers by their companies showed that these executives spent most of their time in informal contact with other people. They asked questions; they joked; they schmoozed; they nudged people toward the direction they wanted them to go. These informal discussions and meetings took 76% of these executives' work time. The resulting interactions with thousands of employees and outsiders enabled them to promote their agendas.

3. The Documents That Writers in Organizations Write

People in organizations produce a large variety of documents. Figures 1.3 and 1.4 list a few of the specific documents produced at Joseph T. Ryerson & Son. Ryerson, a subsidiary of a Fortune 500 company, has 25 plants across the United States; it fabricates and sells steel, aluminum, and plastics to a wide variety of industrial clients.

All of the documents in Figures 1.3 and 1.4 have one or more of the **three basic purposes of organizational writing:** to inform, to request or persuade, and to build goodwill. When you **inform,** you explain something or tell readers something. When you **request or persuade,** you want the reader to act. The word *request* suggests that the action will be easy or routine; *persuade* suggests that you will have to motivate and convince the reader to act. When you **build goodwill,** you create a good image of yourself and of your organization—the kind of image that makes people want to do business with you.

Most messages have multiple purposes. When you answer a question, you're informing, but you also want to build goodwill by suggesting that you're competent and perceptive and that your answer is correct and complete. In a claims adjustment, whether your answer is *yes* or *no*, you want to suggest that the reader's claim has been given careful consideration and that the decision is fair, businesslike, and justified.

Figure 1.3 *Internal Documents Produced in One Organization*

Document	Description of document	Purpose(s) of document
Transmittal	Memo accompanying document, telling why it's being forwarded to the receiver	Inform; persuade reader to read document; build image and goodwill
Monthly or quarterly report	Report summarizing profitability, productivity, and problems during period. Used to plan activity for next month or quarter	Inform; build image and goodwill (report is accurate, complete; writer understands company)
Policy and procedure bulletin	Statement of company policies and instructions (e.g., how to enter orders, how to run fire drills, etc.)	Inform; build image and goodwill (procedures are reasonable)
Request to deviate from policy and procedure bulletin	Persuasive memo arguing that another approach is better for a specific situation than the standard approach	Persuade; build image and goodwill (request is reasonable; writer seeks good of company)
Performance appraisal	Evaluation of an employee's performance, with recommended areas for improvement or recommendation for promotion	Inform; persuade employee to improve
Memo of congratulations	Congratulations to employees who have won awards, been promoted, or earned community recognition	Build goodwill

Figure 1.4 External Documents Produced in One Organization

Document	Description of document	Purpose(s) of document
Quotation	Letter giving price for a specific product, fabrication, or service	Inform; build goodwill (price is reasonable)
Claims adjustment	Letter granting or denying customer request to be given credit for defective goods	Inform; build goodwill
Job description	Description of qualifications and duties of each job. Used for performance appraisals, setting salaries, and for hiring	Inform; persuade good candidates to apply; build goodwill (job duties match level, pay)
10-K report	Report filed with the Securities and Exchange Commission detailing financial information	Inform
Annual report	Report to stockholders summarizing financial information for year	Inform; persuade stockholders to retain stock and others to buy; build goodwill (company is a good corporate citizen)
Thank-you letter	Letter to suppliers, customers, or other people who have helped individuals or the company	Build goodwill

Two of the documents listed in Figure 1.4 package the same information in different ways for different audiences. The 10-K report filed with the Securities and Exchange Commission (SEC) and the annual report distributed to stockholders contain essentially the same information, but differing purposes and differing audiences create two distinct documents. The 10-K report is informative, designed merely to show that the company is complying with SEC regulations. The annual report, in contrast, has multiple purposes and audiences. Its primary purpose is to convince stockholders that the company is a good investment and a good corporate citizen. Annual reports will also be read by employees, stockbrokers, potential stockholders, and job applicants, so the firm creates a report that is persuasive and builds goodwill as well as presenting information.

4. The Cost of Correspondence

Writing costs money. In 1996, according to the Dartnell Institute, a short one-page business letter cost between $13.60 and $20.52, depending on how it was produced. Dartnell's estimates assume that an executive dictates a letter in 10 minutes. But a consultant who surveyed employees in seven industries found that most of them spent 54 minutes planning, composing, and revising a one-page letter. Her respondents, then, each spent over $84 at 1996 prices to create a one-page letter. Dartnell no longer calculates the cost of a business letter, but it seems likely that costs have not fallen. One company in Minneapolis writes 3,000 original letters a day. If each of those letters is written in slightly less than an hour, it spends at least $252,000 a day just on outgoing correspondence.

In many organizations, all external documents must be approved before they go out. A document may cycle from writer to superior to writer to another superior to writer again 3 or 4 or even 11 times before it is finally approved. The cycling process increases the cost of correspondence

Longer documents can involve large teams of people and take months to write. An engineering firm that relies on military contracts for its business calculates that it spends $500,000 to put together an average proposal and $1 million to write a large proposal.

Good communication is worth every minute it takes and every penny it costs. In fact, in a survey conducted by the International Association of Business Communicators, CEOs said that communication yielded a 235% return on investment.

The Costs of Poor Correspondence

When writing isn't as good as it could be, you and your organization pay a price in wasted time, wasted efforts, and lost goodwill.

Wasted Time

Bad writing takes longer to read. Studies show that up to 97% of our reading time is taken not in moving our eyes across the page but in trying to understand what we're reading. How quickly we can do this is determined by the difficulty of the subject matter and by the document's organization and writing style.

Second, bad writing may need to be rewritten. Many managers find that a disproportionate amount of their time is taken trying to explain to subordinates how to revise a document.

Third, ineffective writing may obscure ideas so that discussions and decisions are needlessly drawn out. People inside an organization may disagree on the best course, and the various publics with which organizations communicate may have different interests and values. But if a proposal is clear, at least everyone will be talking about the same proposed changes, so that differences can be recognized and resolved more quickly.

Fourth, unclear or incomplete messages may require the reader to ask for more information. A reader who has to supplement the memo with questions interrupts the writer. If the writer is out of the office when the reader stops by or calls, even more time is wasted, for the reader can't act until the answer arrives.

Wasted Efforts

Ineffective messages don't get results. A reader who has to guess what the writer means may guess wrong. A reader who finds a letter or memo unconvincing or insulting simply won't do what the message asks. In 1986, Frank Grazian said that between 15% and 30% of business and government letters and memos were written only because the first document didn't do the job. One company sent out past-due bills with the following language:

Per our conversation, enclosed are two copies of the above-mentioned invoice. Please review and advise. Sincerely,.. .

The company wanted money, not advice, but it didn't say so. The company had to write third and fourth reminders. It waited for its money, lost interest on it— and kept writing letters.

Lost Goodwill

Whatever the literal content of the words, every letter, memo, or report serves either to build or to undermine the image the reader has of the writer.

Part of building a good image is taking the time to write correctly. Even organizations that have adopted casual dress still expect writing to appear professional and to be free from typos and grammatical errors.

Messages can also create a poor image because of poor audience analysis and inappropriate style. The form letter printed in Figure 1.5 failed because it was stuffy and selfish. Four different customers called to complain about it. When you think how often you are annoyed by something—a TV commercial, a rude clerk—but how rarely you call or write the company to complain, you can imagine the ill will this letter generated.

As the comments in red show, several things are wrong with the letter in Figure 1.5.

1. The language is stiff and legalistic. Note the obsolete (and sexist) "Gentlemen:" "Please be advised," "herein," and "expedite."

2. The tone is selfish. The letter is written from the writer's point of view; there are no benefits for the reader. (The writer says there are, but, without a shred of evidence, the claim isn't convincing.)

3. The main point is buried in the middle of the long first paragraph. The middle is the least emphatic part of a paragraph.

4. The request is vague. How many references does the supplier want? Are only vendor references OK, or would other credit references, like banks, work too? Is the name of the reference enough, or is it necessary also to specify the line of credit, the average balance, the current balance, the years credit has been established, or other information? What "additional financial information" does the supplier want? Annual reports? Bank balance? Tax returns? The request sounds like an invasion of privacy, not a reasonable business practice.

5. Words are misused *(herein* for *therein),* suggesting either an ignorant writer or one who doesn't care enough about the subject and the reader to use the right word.

Benefits of Improving Correspondence

Better writing helps you to

- **Save time.** Reduce reading time, since comprehension is easier. Eliminate the time now taken to rewrite badly written materials. Reduce the time taken asking writers "What did you mean?"
- **Make your efforts more effective.** Increase the number of requests that are answered positively and promptly—on the first request. Present your points—to other people in your organization; to clients, customers, and suppliers; to government agencies; to the public—more forcefully.
- **Communicate your points more clearly.** Reduce the misunderstandings that occur when the reader has to supply missing or unclear information. Make the issues clear, so that disagreements can surface and be resolved more quickly.
- **Build goodwill.** Build a positive image of your organization. Build an image of yourself as a knowledgeable, intelligent, capable person.

Criteria for Effective Messages

Good business and administrative writing meets five basic criteria: it's clear, complete, and correct; it saves the reader's time; and it builds goodwill.

1. **It's clear.** The meaning the reader gets is the meaning the writer intended. The reader doesn't have to guess.
2. **It's complete.** All of the reader's questions are answered. The reader has enough information to evaluate the message and act on it.
3. **It's correct.** All of the information in the message is accurate. The message is

free from errors in punctuation, spelling, grammar, word order, and sentence structure.

4. **It saves the reader's time.** The style, organization, and visual impact of the message help the reader to read, understand, and act on the information as quickly as possible.

5. **It builds goodwill.** The message presents a positive image of the writer and his or her organization. It treats the reader as a person, not a number. It cements a good relationship between the writer and the reader.

Whether a message meets these five criteria depends on **the interactions among the writer, the audience, the purposes of the message, and the situation.** No single set of words will work in all possible situations.

Lecture 2 TRENDS IN BUSINESS AND ADMINISTRATIVE COMMUNICATION

1. *Trends in business and administrative communication*
2. *Understanding and analyzing business communication situations*
3. *How to solve business communication problems*

1. Trends in business and administrative communication

Both business and business communication are changing. Ten trends in business, government, and nonprofit organizations affect business and administrative communication: a focus on quality and customers' needs, entrepreneurship and outsourcing, teams, diversity, globalization, technology, legal and ethical concerns, balancing work and family, the end of the job, and the rapid rate of change.

Focus on Quality and Customers' Needs

Successful companies make money by offering high-quality products and services that their customers want. Aladan Corp., founded in 1986 in Dothan, Alabama, has cornered nearly 20% of the world market in latex examination gloves by providing a quality product quickly at a low price. Chris Zane's Cycles has grown 25% a year in New Haven, Connecticut, by offering free lifetime service and a cellular phone with the bicycles Zane sells, gourmet coffee while bikes are serviced, a toll-free number, and 90-day price guarantees.

While flexible, responsive companies have been growing, many of the giant US companies that relied on their large market share for continued profits have gone through painful downsizing. Xerox Corporation, for example, once figured that because the service department earned a profit, it didn't matter that its copiers broke down and had to be serviced. But people wanted copiers that didn't break down and turned to Japanese copiers. Xerox has been able to reinvent itself. Now, more companies are "benchmarking": comparing themselves to the best in their industries. The best companies are working to be even better. Chevron created "process masters" to help spread best practices from one plant to another. A new way of cleaning pipes developed in one refinery now saves $1 million every time a refinery needs cleaning.

Focusing on what customers want may lead a business to redefine itself. Business Interiors sold office furniture in Irving, Texas. The CEO said, "Forget what we sell, let's ask customers what they want and organize ourselves around that." Now the company provides a wide range of products and services—including computer-aided design for offices and office buildings.

Communication is at the center of the focus on quality and customers' needs. Brainstorming and group problem solving are essential to develop more efficient ways to do things. Then the good ideas have to be communicated throughout the company. Innovators need to be recognized. And only by listening to what customers say—and listening to the silences that may accompany their actions—can an organization know what its customers really want.

Entrepreneurship and Outsourcing

In 1995, nearly 13 million Americans were self-employed and working full-time at home. That figure doesn't count the small-business owners whose companies have grown beyond the owner's home or garage. Entrepreneurship is so popular that many business schools now offer courses, internships, or whole programs in starting and running a business.

Some established companies are trying to match the success and growth rate of start-ups by nurturing an entrepreneurial spirit within their organizations. Innovators who work within organizations are sometimes called **intrapreneurs.** Researchers at 3M can spend 15% of their time working on ideas that don't need management approval; Post-it Notes and the Scotch-Brite Never Rust wool soap pad are two products that came out of 3M's "skunk works." Thermo Electron lets managers "spin out" promising new businesses. Xerox employees write business proposals competing for corporate funds to develop new technologies.

Some businesses have been forced to become entrepreneurial because of outsourcing. **Outsourcing** means going outside the company for products and services that once were made by the company's employees. The people who are now Corsair Communications Inc. were jettisoned in December 1994 by the California-based defense contractor for whom they'd worked most of their professional lives. Instead of automatically getting assignments and pay, they had to propose products and find customers. The company has succeeded—in large part because CEO Mary Ann Byrnes has changed the corporate culture.

Entrepreneurs have to handle all the communication in the organization: hiring, training, motivating, and evaluating employees; responding to customer complaints; drafting surveys; writing business plans; and making presentations to venture capitalists.

Outsourcing makes communication more difficult—and more important—than it was when jobs were done in-house. It's harder to ask questions, since people are no longer down the hall. And it's easier for problems to turn into major ones. Some companies now are creating a "Chief Resource Officer" to monitor contracts with vendors so that lines of communication will be clear.

Teams

To produce quality products while cutting costs and prices, more and more companies are relying on cross-functional teams. A team of 10 middle managers from various departments at the North Island Naval Depot improved the process of manufacturing replacement parts for fighter planes. They cut the time needed to manufacture and deliver a part by 42% and have saved the Navy—and thus taxpayers—$1.7 million in a year and a half. Teams at Dettmers Industries in Stuart, Florida, make a product in 80 hours—down from 140 hours three years ago. Though employees earn more—sometimes much more—than workers in comparable local industries, the company's labor costs have remained steady, while sales are up 50% and profit margins are twice the industry standard.

The prevalence of teams puts a premium on learning to identify and solve problems, to share leadership, to work *with* other people rather than merely delegating work *to* other people, to resolve conflicts constructively, and to motivate everyone to do his or her best job.

Diversity

Teams put a premium on being able to work with other people—even if they come from different backgrounds.

Women, immigrants have always been part of the workforce. But for most of our country's history, they were relegated to clerical, domestic, or menial jobs. Even when men from working-class families began to get college degrees in large numbers after World War II, and large numbers of women and minorities entered the professions in the 1960s and 1970s, only a few made it into management. Now, US businesses realize that barriers to promotion hurt the bottom line as well as individuals. Success depends on using the brains and commitment as well as the hands and muscles of every worker.

In the last decade, we have also become aware of other sources of diversity beyond those of gender and race: age, religion, class, regional differences, sexual orientation, physical disabilities. Helping each worker reach his or her potential requires more flexibility from managers as well as more knowledge about intercultural communication. And it's crucial to help workers from different backgrounds understand each other—especially when continuing layoffs make many workers fear that increased opportunities for someone else will come only at a cost to themselves.

Globalization

Business has become truly global. The global economy is more than simply importing or exporting products. Instead, more and more companies have factories and offices in several countries. Even small companies send managers on overseas assignments.

Technology

Changes in technology support and drive changes in other areas. **Intranets**— Web pages just for employees—give everyone in an organization access to information. To save the Waterville, Maine, ballet company, a retired Marine colonel assembled a nationwide board of directors that met every other night on the Internet. Fax, e-mail, pagers, and text typewriter (TTY) telephones enable deaf and other hearing-impaired employees to fill a variety of jobs.

Technology helps organizations save money. FedEx cut the cost of checking on delivery status from $5 a package to only 5 cents by letting customers ask electronically on their own PCs. Total savings are estimated at $2 million a year. Aetna insurance company saves $6 million a year by replacing paper insurance manuals with documents that exist only online. A health insurance company uses desktop publishing to create benefits booklets for its customers. The savings: only 5 days—not 45—are needed to produce new booklets, a huge backlog is eliminated, and the company saves $350,000 in postal costs alone. Fingerhut sends customers with children a birthday flyer advertising toys appropriate for the child's age and sex and a personalized message—complete with the child's name and birth month. Fingerhut's mail order sales have grown every year—up to 14% —even during recessions.[32]

Modems, faxes, and videophones allow employees to work at home rather than commute to a central office. Fax and e-mail make it easy to communicate across oceans and time zones. Teleconferencing makes it possible for people on different continents to have a meeting—complete with visual aids—without leaving their hometowns.

Technological change carries costs. Technology makes it easier for companies to monitor employees—even when they're out of the office. While technology creates new jobs, it eliminates old ones, requiring employees to retrain. Acquiring technology and helping workers master it requires an enormous capital investment. Learning to use new-generation software and improved hardware takes time and may be especially frustrating for people who were perfectly happy with the old software. And the very ease of storing information and sending messages means that managers have more information and more messages to process. **Information overload** occurs when messages arrive faster than the human receiver can handle them. In the information age, time management depends in part on being able to identify which messages are important so that one isn't buried in trivia.

The technology of office communication also affects the way people interpret messages. Readers expect all documents to be well designed and error free—even though not everyone has access to a laser printer or even to a computer. Fax technology leads people to expect documents instantly, even though the work and thinking required to produce the document still take time.

Legal and Ethical Concerns

Legal fees cost US businesses hundreds of thousands of dollars. The price of many simple items, such as ladders, is inflated greatly by the built-in reserve to protect the manufacturer against lawsuits. Companies are finding that clear, open communication can reduce lawsuits by giving all the parties a chance to shape policies and by clarifying exactly what is and isn't being proposed.

Ethical concerns don't carry the same clear dollar cost as legal fees. But over the last 25 years, Clinton's impeachment, Ivan Boesky's insider trading, Beechnut's allowing fake apple juice to be sold in its baby food, Watergate, the savings and loan debacle, and experiments suggesting that many business people and business students were willing to commit fraud have left many consumers with a deep distrust of both business and government. To regain public trust and to avoid further regulation, business and government must both act ethically and convince the public that they are doing so.

To help clients encourage good people to do the right thing, KPMG Peat Marwick, a Big Five accounting firm, offers an "ethics audit" to increase discussion of ethical issues in the workplace and identify places where an organization's system may break down.

As Figure 1.6 suggests, language, graphics, and document design— basic parts of any business document—can be ethical or manipulative. Persuasion and gaining compliance—activities at the heart of business and organizational life—can be done with respect or contempt for customers, co-workers, and subordinates.

Figure 1.6 *Ethical Issues in Business Communication*

How the message is conveyed	What the message is	The larger organizational context of the message
Language, Graphics, and Document Design • Is the message audience-friendly? Does it respect the audience? • Do the words balance the organization's right to present its best case with its responsibility to present its message honestly? • Do graphics help the audience understand? Or are graphics used to distract or confuse? • Does the design of the document make reading easy? Does document design attempt to make readers skip key points? **The tactics used to shape response** • Are the arguments logical? • Are the emotional appeals used fairly? Do they supplement logic rather than substituting for it? • Does the organizational pattern lead the audience without undue manipulation? • Are the tactics honest? That is, do they avoid deceiving the audience?	• Is the message that is communicated an ethical one that treats all parties fairly and is sensitive to all stakeholders? • Have interested parties been able to have input into the decision or message? • Does the audience get all the information it needs to make a good decision? • Is information communicated in a timely way, or is information withheld to reduce the audience's power? • Is information communicated in a schema the audience can grasp, or are data "dumped" without any context?	• How does the organization treat its employees? How do employees treat each other? • How sensitive is the organization to stakeholders such as the people who live near its factories, stores, or offices and to the general public? • Does the organization support employees' efforts to be honest, fair, and ethical? • Do the organization's actions in making products, buying supplies, and marketing goods and services stand up to ethical scrutiny? • Is the organization a good corporate citizen, helpful rather than harmful to the community in which it exists? • Are the organization's products or services a good use of scarce resources?

Ethical concerns start with telling the truth and offering good value for money. Organizations must be concerned about broader ethical issues as well: being good environmental citizens, offering a good workplace for their employees, contributing to the needs of the communities in which they operate.

Balancing Work and Family

The Wall Street Journal now runs a regular column on Work and Family. One staff writer notes,

Two research studies named a "lack of balance between work and personal life" one of the top six reasons new managers fail and one of the top five reasons relocations fail. In contrast, Xerox and First Tennessee National Corp. are among companies that have found that taking workers' family needs into consideration produces clear gains in productivity and customer service.

Balancing work and family requires using ways other than physical presence to demonstrate one's commitment to and enthusiasm for organizational goals. It may require negotiating conflicts with other workers who have different family situations or who raised children years ago when fewer companies were family-friendly. The downside of this trend is that sometimes work and family life are not so much balanced as blurred. Lori D. Lewis, Hewlett-Packard's Worldwide Reseller Channel Manager for Disk Drives, reports that she has approved prices on a cellular phone on the ski slopes. This flexibility is necessary in an age of downsizing and doing business in many time zones, but it means that she, like many managers, is essentially on call all the time.

The End of the Job

In traditional jobs, people did what they were told to do. Now, they do whatever needs to be done.

With flatter organizations, workers are doing a much wider variety of tasks. Teams of hourly workers at Weyerhaeuser visit customers in the United States and in Japan to see the demands that high-speed printing makes on their newsprint. When they come back from a trip, they make presentations for two or three weeks to co-workers at the plant.

Your parents may have worked for the same company all their lives. You may do that, too, but you have to be prepared to job-hunt—not only when you finish your degree, but also throughout your career. That means continuing to learn — keeping up with new technologies, new economic and political realities, new ways of interacting with people.

Rapid Rate of Change

Rapid change is a constant in business and government today. Change means that what worked yesterday may not work today, let alone tomorrow. But change is stressful. Many people, especially those who have felt battered by changes in the workplace, fear that more change will further erode their positions. Even when change promises improvements, people have to work to learn new skills, new habits, and new attitudes.

Jack Welch, CEO of General Electric, is widely acknowledged as the leading master of corporate change in our time. He says,

You've got to be on the cutting edge of change. You can't simply maintain the status quo, because somebody's always coming from another country with another product, or consumer tastes change, or the cost structure does, or there's a technology breakthrough. If you're not fast and adaptable, you're vulnerable. This is true for every segment of every business in every country in the world.

Rapid change means that no college course or executive MBA program can teach you everything you need to know for the rest of your working life. You'll need to remain open to new ideas. And you'll need to view situations and options critically, so that you can evaluate new conditions to see whether they demand a new response. But the skills you learn can stand you in good stead for the rest of your life: critical thinking, computer savvy, problem solving, and the ability to write, to speak, and to work well with other people.

2. Understanding and Analyzing Business Communication Situations

The best communicators are conscious of the context in which they communicate; they're aware of options.

Ask yourself the following questions:

• **What's at stake—to whom?** Think not only about your own needs but also about the concerns your boss and your readers will have. Your message will be most effective if you think of the entire organizational context—and the larger context of shareholders, customers, and regulators. When the stakes are high, you'll need to take into account people's emotional feelings as well as objective facts.

• **Should you send a message?** Sometimes, especially when you're new on the job, silence is the most tactful response. But be alert for opportunities to learn, to influence, to make your case. You can use communication to build your career.

• **What channel should you use?** Paper documents and presentations are formal and give you considerable control over the message. E-mail, phone calls, and stopping by someone's office are less formal. Oral channels are better for group decision making, allow misunderstandings to be cleared up more quickly, and seem more personal. Sometimes you may need more than one message, in more than one channel.

• **What should you say?** Content for a message may not be obvious. How detailed should you be? Should you repeat information that the audience already knows? The answers will depend on the kind of document, your purposes, audiences, and the corporate culture. And you'll have to figure these things out for yourself, without detailed instructions.

• **How should you say it?** How you arrange your ideas—what comes first, second, and last—and the words you use shape the audience's response to what you say.

3. How to Solve Business Communication Problems

When you're faced with a business communication problem, you need to. develop a solution that will both **solve the organizational problem and meet the psychological needs of the people involved.** The strategies in this section will help you solve the problems in this book. Almost all of these strategies can also be applied to problems you encounter on the job.

• **Understand the situation.** What are the facts? What can you infer from the information you're given? What additional information might be helpful? Where could you get it?

• **Use the six questions for analysis in Figure 1.7 to analyze your audience, your purposes, and the situation.** Try to imagine yourself in the situation, just as you might use the script of a play to imagine what kind of people the characters are. The fuller an image you can create, the better.

• **Brainstorm solutions.** In all but the very simplest problems, there are *several* possible solutions. The first one you think of may not be best. Consciously develop several solutions. Then measure them against your audience and purposes: Which solution is likely to work best?

• **If you want to add or change information, get permission first.** You can add facts or information to the problems in this book only if the information (1) is realistic, (2) is consistent with the way real organizations work, and (3) does not change the point of the problem. If you have any questions about ideas you want to use, *ask your instructor*. He or she can tell you *before* you write the message.

Use this process to create good messages:'

Answer the six questions for. analysis m Figwe 17.

Organize your information to fit your audiences, your purposes, and the situation.

Make your document visually inviting.

Revise your draft to create a friendly, businesslike, positive style.

Edit your draft for standard English; double-check names and numbers.

Use the response you get to plan future messages.

Answer the Six Questions for Analysis.

The six questions in Figure 1.7 help you analyze your audience(s), purpose(s), and the organizational context.

Figure 1.7 Six Questions for Analysis

1.Who is (are) your audience(s)? What characteristics of your audience(s) are relevant to this particular message? If you are writing or speaking to more than one person, how do the people in your audience differ?
2. What are your purposes in writing?
3. What information must your message include?
4. How can you build support for your position? What reasons or reader benefits will your reader find convincing
5. What objection(s) can you expect your reader(s) to have? What negative elements must you deemphasize or overcome?
6. What aspects of the total situation may affect reader response? The time of year? Morale in the organization? The relationship between reader and writer? Any special circumstances?

1. **Who is (are) your audience(s)? What characteristics are relevant to this particular message? If you are writing or speaking to more than one person, how do the people in your audience differ?**

How much does your audience know about your topic? How will they respond to your message? Some characteristics of your readers will be irrelevant; focus on ones that matter *for this message.* Whenever you write to several people or to a group (like a memo to all employees), try to identify the economic, cultural, or situational differences that may affect how various subgroups may respond to what you have to say.

2. **What are your purposes in writing?**

What must this message do to solve the organizational problem? What must it do to meet your own needs? What do you want your readers to do? to think or feel? List all your purposes, major and minor. Specify *exactly* what you want your reader to know or think or do. Specify *exactly* what kind of image of yourself and of your organization you want to project.

Even in a simple message, you may have several related purposes: to announce a new policy, to make readers aware of the policy's provisions and requirements, and to have them feel that the policy is a good one, that the organization cares about its employees, and that you are a competent writer and manager.

3. **What information must your message include?**

Make a list of the points that must be included; check your draft to make sure you include them all. If you're not sure whether a particular fact must be included, ask your instructor or your boss.

To include information without emphasizing it, put it in the middle of a paragraph or document and present it as briefly as possible.

4. **How can you build support for your position? What reasons or reader benefits will your reader find convincing?**

Brainstorm to develop reasons for your decision, the logic behind your argument, and possible benefits to readers if they do as you ask. Reasons and reader benefits do not have to be monetary. Making the reader's job easier or more pleasant is a good reader benefit. In an informative or persuasive message, identify at least five reader benefits. In your message, **use** those that you can develop most easily and most effectively.

Be sure the benefits are adapted to your reader. Many people do not identify closely with their companies; the fact that the company benefits from a policy will help the reader only if the saving or profit is passed directly on to the employees. That is rarely the case: savings and profits are often eaten up by returns to stockholders, bonuses to executives, and investments in plants and equipment or in research and development.

5. **What objection(s) can you expect your reader(s) to have? What negative elements of your message must you de-emphasize or overcome?**

Some negative elements can only be de-emphasized. Others can be overcome. Be creative: is there any advantage associated with (even though not caused by) the negative? Can you rephrase or redefine the negative to make the reader see it differently?

6. **What aspects of the total situation may affect reader response? The economy? The time of year? Morale in the organization? The relationship between the reader" and writer? Any special circumstances?**

Readers may like you or resent you. You may be younger or older than the people you're writing to. The organization may be prosperous or going through hard times; it may have just been reorganized or may be stable. All these different situations will affect what you say and how you say it.

Think about the news, the economy, the weather. Think about the general business and regulatory climate, especially as it affects the organization specified in the problem. Use the real world as much as possible. Think about interest rates, business conditions, and the economy. Is the industry in which the problem is set doing well? Is the government agency in which the problem is set enjoying general support? Think about the time of year. If it's fall when you write, is your business in a seasonal slowdown after a busy summer?

To answer these questions, draw on your experience, your courses, and your common sense. You may want to talk to other students or read *The Wall Street Journal* or look at a company's Web site. Sometimes you may even want to phone a local business person to get information. For instance, if you needed more information to think of reader benefits for a problem set in a bank, you could call a local banker to find out what services it offers customers and what its rates are for loans.

Organize Your Information to Fit Your Audiences, Your Purposes, **and** the Situation.

You'll remember these three basic principles:

1.Put good news first.

2.In general, put the main point or question first. In the subject line or first paragraph, make it clear that you're writing about something that is important to the reader.

3.Disregard point 2 and approach the subject indirectly when you must persuade a reluctant reader.

Make Your Document Visually Inviting.

A well-designed document is easier to read and builds goodwill. To make a document visually attractive

- Use subject lines to orient the reader quickly.
- Use headings to group related ideas.
- Use lists and indented sections to emphasize subpoints and examples.
- Number points that must be followed in sequence.
- Use short paragraphs—usually six typed lines or fewer.

If you plan these design elements before you begin composing, you'll save time and the final document will probably be better.

The best physical form for a document depends on how it will be used. For example, a document that will be updated frequently needs to be in a loose-leaf binder, so the reader can easily throw away old pages and insert new ones.

Revise Your Draft to Create a Friendly, Businesslike, Positive Style.

In addition to being an organizational member or a consumer, your reader has feelings just as you do. Writing that keeps the reader in mind uses **you-attitude.** Read your message over as if you were in your reader's shoes. How would you feel if *you* received it? '

Good business and administrative writing is both friendly and businesslike. If you're too stiff, you put extra distance between your reader and yourself. If you try to be too chummy, you'll sound unprofessional. When you write to strangers, use simple, everyday words and make your message as personal and friendly as possible. When you write to friends, remember that your message will be filed and read by people you've never even heard of: avoid slang, cliches, and "in" jokes.

Sometimes you must mention limitations, drawbacks, or other negative elements, but don't dwell on them. People will respond better to you and your organization if you seem confident. Expect success, not failure. If you don't believe that what you're writing about is a good idea, why should they?

You emphasize the positive when you

- Put positive information first, give it more space, or set it off visually in an indented list.
- Eliminate negative words whenever possible.
- Focus on what is possible, not what is impossible.

Edit Your Draft for Standard English; Double-Check Names and Numbers.

Business people care about correctness in spelling, grammar, and punctuation. If your grasp of mechanics is fuzzy, if standard English is not your native dialect, or if English is not your native language, you'll need to memorize rules and perhaps find a good book or a tutor to help you. Even software spelling and grammar checkers require the writer to make decisions. If you know how to write correctly but rarely take the time to do so, now is the time to begin to edit and proofread to eliminate careless errors.

Always proofread your document before you send it out. Double-check the reader's name, any numbers, and the first and last paragraphs.

Use the Response You Get to Plan Future Messages.

Evaluate the **feedback,** or response, you get. The real test of any message is “Did you get what you wanted, when you wanted it?" If the answer is *no*, then the message has failed—even if the grammar is perfect, the words elegant, the approach creative, the document stunningly attractive. If the message fails, you need to find out why.

Analyze your successes, too. You know you've succeeded when you get the results you want, both in terms of objective, concrete actions and in terms of image and goodwill. You want to know *why* your message worked. Often, you'll find that the principles in this book explain the results you get. If your results are different, why? There has to be a reason, and if you can find what it **is,** you'll be more successful more often.

Summary of Key Points

1) Communication helps organizations and the people in them achieve their goals. The ability to write and speak well becomes increasingly important as you rise in an organization.

2) People put things in writing to create a record, to convey complex data, to make things convenient for the reader, to save money, and to convey their own messages more effectively.

3) **Internal documents** go to people inside the organization. **External documents** go to audiences outside: clients, customers, suppliers, stockholders, the government, the media, and the general public.

4) The three basic purposes of business and administrative communication are **to inform, to request or persuade, and to build goodwill.** Most messages have more than one purpose.

5) A one-page business letter that took 10 minutes to dictate cost between $13.60 and $20.52 in 1996. Poor writing costs even more since it wastes time, wastes effort, and jeopardizes goodwill.

6) Good business and administrative writing meets five basic criteria: it's **clear, complete,** and **correct;** it **saves the reader's time;** and it **builds goodwill.**

7) To evaluate a specific document, we must know the interactions among the writer, the reader(s), the purposes of the message, and the situation. No single set of words will work for all readers in all situations.

8) Ten trends affecting business and administrative communication are a focus on quality and customers' needs, entrepreneurship and outsourcing, teams, diversity, international competition and opportunities, technology, legal and ethical concerns, balancing work and family, the end of the job, and the rapid rate of change.

9) To understand business communication situations, ask the following questions:
   - What's at stake—to whom?
   - Should you send a message?
   - What channel should you use?
   - What should you say?
   - How should you say it?

Lecture 3 THEORIES OF COMMUNICATION

1.Theories of communication

2.The process of communication

1. Theories Of Communication

We have been discussing how important communication will be for your success in business communication. Communication does not occur haphazardly. Nor does it happen all at once. It is more than a single act. It is a dynamic, transactional (two way) process that can be broken into different phases. To have a better understanding of the process of communication, we need to look at different theories of it.

Electronic Theory

One very influential theory is called the mathematical or electronic theory of communication. This idea emphasized the technical problems of transmitting a message from a sender to a receiver. It is based on, and uses the language of, electronics.

The message begins with an *information source*, the mind of the sender (writer or speaker), who *encodes* a message into words and sentences. The message is *transmitted* as a signal (marks on paper or sound waves) through a channel, where it may be distorted by *noise* (such as smudged typing or acoustical problems). As a last step, the receiver (listener or reader) *decodes* the message. Look at the following illustration of this theory.

Message

Communicator	**Audience**
As "sender"	as "receiver"

The electronic theory is helpful because it introduces the ideas of senders and receivers and of possible interference. It emphasizes one important aspect of communication: accuracy. Its usefulness is limited, people are not machines. It may be possible to design perfectly an accurate electronic communication system but not a human one. Emphasis on accuracy ignores many other important dimensions of the situation in which we communicate. One may express an idea very accurately, but other may think he does not have the right to talk, so we need to understand other theories too.

Social Environment Theory

Social environment theory is of the social and behavioral scientists. It says that we must consider the situation, the social context in which we will work. When we work and communicate together, we all participate in a social situation. Within that situation, each agrees to assume certain roles – such as "compromiser," "initiator," "or "encourager" – based on our part in the activity.

We each have a certain status prescribed officially, such as our job title. We need to understand the rules, or the "culture," of the environment in order to communicate: both the official rules – such as company policies and practices – and those unwritten rules regarding to whom, how, and when, and for how long it is appropriate for us to communicate within a certain organization. Look at the following illustration of this theory.

Message

Communicator
As “sender”

Audience
as “receiver”

Within a certain environment

Social environment is helpful because it adds the important dimension of the specific social situation. Too often, inexperienced business people neglect to take into account role status and rules when they communicate.
A nicely tailored message may still fail to achieve its objective if you write to the wrong person at the wrong time.

Rhetorical Theory
Third set of theorists add more dimensions to our understanding of the communication process: communication is not linear, but circular; not just sending a message to be received, but producing a response; not static, but dynamic.
Rhetorical theorists provide an important addition to a communication model for business communicators
Many people in business get so much absorbed in the accuracy of their message and appropriateness of the situation that they forget the third crucial variable, producing the desired *response* form their audience. The importance of response in business communication is illustrated in the following figure—which incorporates the ideas of accuracy (from the collective theory) and situation (from the social environment theory).
This model is circular, not linear.

Message
Message
Communicator
Audience
Response
Response

In fact, perhaps the most important difference between business communication and other forms of communication is this circular quality: your business communication effectiveness depends on the result you achieve. How can you achieve desired response? That’s what the rest of this course will be about. You will learn not only how to be more correct and accurate, and how to be more sensitive to the situation, but also how to identify your audience’s needs in order to become a better communicator.

2. The Process of Communication & Miscommunication
Communication is a process of sending and receiving verbal and nonverbal messages.

Communication is considered effective when it achieves the desired reaction or response from the receiver.

Communication is a two way process of exchanging ideas or information.

The process of communication has six components: sender/encoder, message, medium, receiver/decoder, and feedbacks.

Context

Every message, whether oral or written, begins with context. Context is a broad field that includes country, culture, organization, and external and internal stimuli.

Another aspect of context is the external stimuli

Internal stimuli have effect on how you translate ideas into a message.

Your attitudes, opinions, emotions, past experiences, likes and dislikes, education, job status and confidence in your communication skills, all influences the way you communicate your ideas, especially important in your ability to analyze your receiver’s cultural, viewpoint ,needs, skills, status, metal ability, experience and expectation. You must consider all these aspects of context in order to communicate a message effectively.

Sender / Encoder

While sending a message, you are the “encoder”, the writer or speaker, depending on whether your message is written or oral you choose symbols—words, graphic, pictures—that express your message so that the receiver(s) will understand and react as you desire

You decide which symbols best convey your message and which message channel will be most effective among the oral and written media (letter, memo, telephone, etc)

Message

The message is the main idea that you wish to communicate; it is of both verbal (written or spoken) symbols and nonverbal (unspoken) symbols. First decide exactly what your message is. Also consider the receiver of your message. You must also consider your context and your receiver’s as well. How your receiver will interpret your message and how it may affect your relationship.

Medium/Channel

It means the way by which a message is communicated

You can choose electronic mail, the printed word or sound etc.

The choice of medium is affected by the relationship between the sender and the receiver. The urgency of a message can also be a factor in whether to use the written or spoken medium. You may also consider factors such as importance, number of receivers, costs and amount of information; you must also consider which medium is preferred in the receiver’s culture.

Based on research, the following describe some of the characteristics found in oral and written communication.

Oral Communication

- The oral communication brings back immediate feedback
- It has a conversational nature with shorter words and sentences
- It stresses on interpersonal relations
- This medium needs less technical details
- Its sentence structures are simple

Written Communication

- This medium is more formal with focus on contents
- It can convey any amount of technical information
- It is best for permanent record
- This medium uses longer words and longer sentences. It brings delayed feedback

Internal communication consists of sending messages inside your organization. External communication consists of sending messages outside your organization.

For internal communication, written media may be:

- memos, reports, bulletins, job descriptions,
- posters, notes, employee manuals,
- electronic bulletin boards, even internal faxes.

Oral communication may take the form of

- staff meeting reports, face to face discussions,
- presentations, audio tapes, telephone chats,
- teleconferences, or videotapes

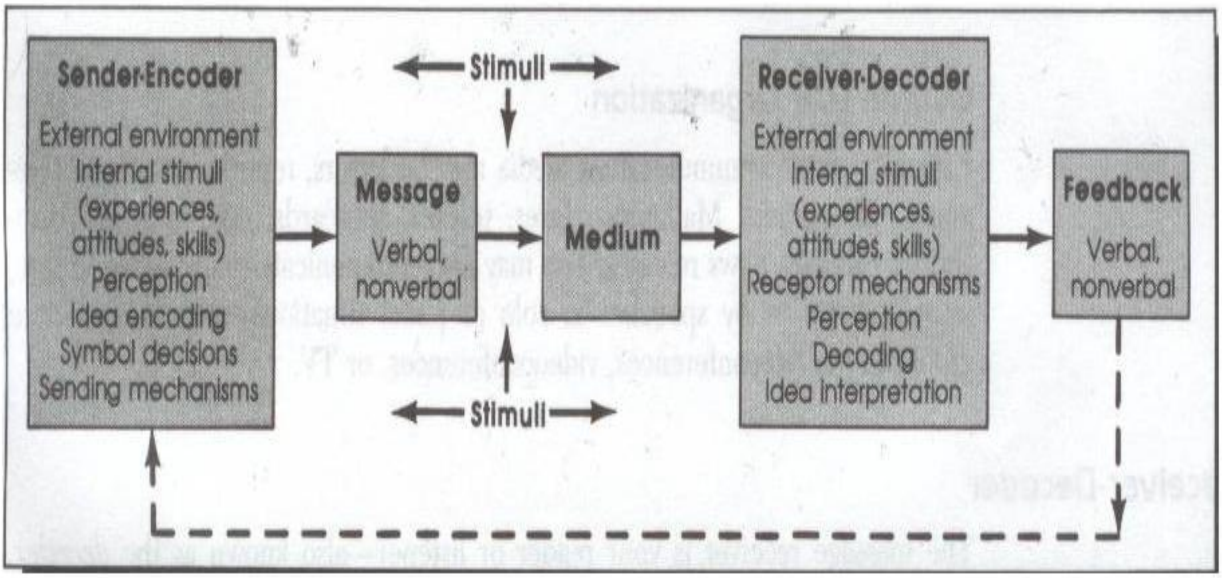
External written communication media may be:

- letters, reports, telegrams, cablegrams,
- mailgrams, faxes, telexes, postcards, contracts,
- ads, brochures, catalogs, news releases etc.

Orally it may be

- face to face discussions, telephone,
- or presentations in solo or panel situations.

Figure of communication



Receiver / Decoder

The receiver / decoder of your message is your reader or listener. He may be influenced by the context and by the external and internal stimuli. The receiver like sender receives messages through the eyes and ears but is also influenced by nonverbal factors such as physical environment, physical appearance, body movements, voice quality, touch, taste, and smell.

All factors of a message are filtered through the receiver's view and experience in the

work.
Therefore, miscommunication can occur when personal biases and individual values cause the receiver to misinterpret the sender's internal message.

Feedback

Feedback can be oral or written; it can also be an action, such as receiving in the mail or an item you ordered. Sometimes silence is used as feedback, though it is not very useful. Senders need feedback in order to determine the success or failure of the communication.

Lecture 4 ADAPTING YOUR MESSAGE TO YOUR AUDIENCE

1.Identifying Your Audiences
2.Audience and the Communication Process
3.Audience and Business Messages

1. Identifying Your Audiences

Audience analysis is fundamental to the success of any message: to capture and hold an audience's attention and to motivate readers and listeners, you must shape your message to meet the audience's goals, interests, and needs.

Who is my audience?

Your audience may include more people than you might think. In an organizational setting, a message may have five audiences.

1. The **initial audience** receives the message first and routes it to other audiences. Sometimes the initial audience also tells you to write the message.
2. The **primary audience** will make the decision to act on your message.
3. The **secondary audience** may be asked to comment on your message or to implement your ideas after they've been approved. Secondary audiences can also include lawyers who may use your message—perhaps years later—as evidence of your organization's culture and practices.
4. A **gatekeeper** has the power to stop your message before it gets to the primary audience. The executive assistant who decides which personnel get to speak to the boss is a gatekeeper. Sometimes the supervisor who assigns the message is also the gatekeeper; however, sometimes the gatekeeper is higher in the organization. Occasionally, gatekeepers exist outside the organization. For example, regulatory boards are gatekeepers.
5. A **watchdog audience**, though it does not have the power to stop the message and will not act directly on it, has political, social, or economic power. The watchdog pays close attention to the transaction between you and the primary audience and may base future actions on its evaluation of your message. The media, boards of directors, and members of program advisory committees can all be watchdogs.

As Figures 2.1 and 2.2 on the next page show, one person or group can be part of two audiences. Frequently, a supervisor is both the initial audience and the gatekeeper. The initial audience can also be the primary audience who will act on the message.

Why is audience so important?

Successful messages anticipate and meet the audience's needs.

Audience focus is central to both the communication process and message analysis (PAIBOC).

2. Audience and the Communication Process

Understanding what your audience needs and expects, and adapting your messages accordingly, greatly enhances your chances of communicating successfully.

The communication process is the most complex of human activities, and the audience is central to that process. We communicate unceasingly. Our audiences interpret our communication symbols unceasingly. Our words, tonal quality, volume and rate of speech, our posture, stance and gait, our height and weight, our hair style and hair color, our choice of clothing styles and colors —all the thousands of symbols that we use, intentionally and unintentionally—are perceived and translated according to our audience's perceptions, shaped by age, gender, culture, intelligence, and the experiences unique to every individual.

FIGURE 2.1
The Audiences for a Marketing Plan

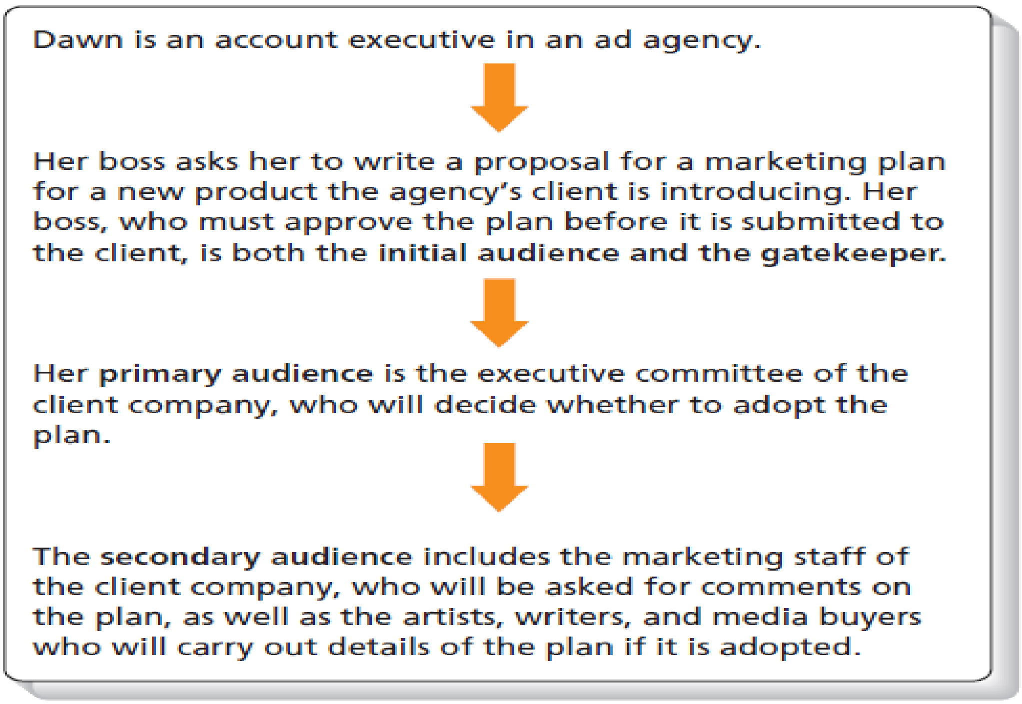
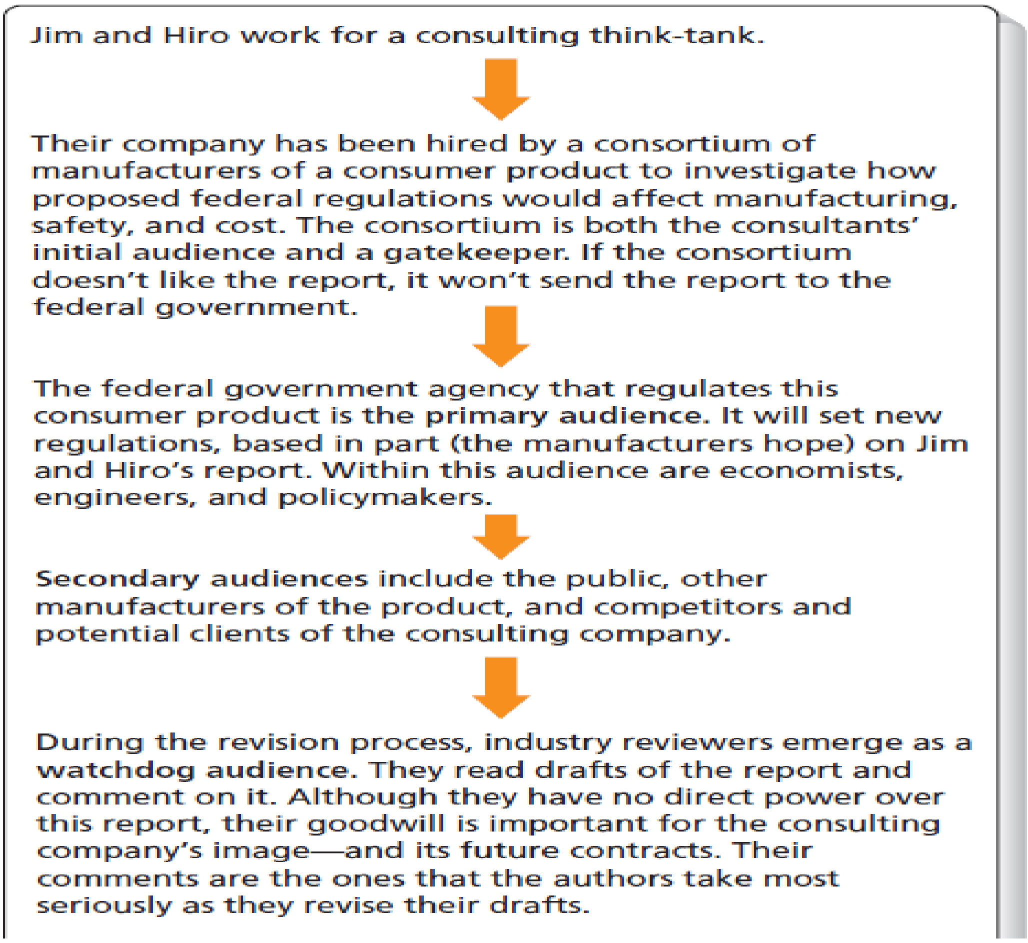


FIGURE 2.2
The Audiences for a Consulting Report



Throughout the process, both sender and receiver construct meaning together. Genuine communication occurs when both parties agree on the meaning and significance of the symbols they are exchanging.

Suppose you and your friend Mediha are having a cup of coffee together, and you realize that you need help studying for the upcoming economics exam. You decide to ask Mediha for her help. You choose to **encode** your request in words. Words, of course, are not the only symbols we use to convey ideas. Thousands and thousands of other messages are embedded in our nonverbal symbols — our surroundings, and our own personal style, for example.

Once you have chosen your words, you must **transmit** your **message** to Mediha via a **channel**. Channels include face-to-face, memos, Blackberries, iPods, billboards, telephones, television, and radio, just to name a few.

Mediha must **perceive** the message in order to **receive** it. That is, Mediha must have the physical ability to hear your request. Then she **decodes** your words: she makes meaning from your symbols. Then Mediha interprets the message, chooses a response, and encodes it. Her response is **feedback**. Feedback may be direct and immediate, or indirect and delayed; feedback also consists of both verbal and nonverbal symbols.

Meanwhile, **noise** influences every part of the process. Noise can be physical or psychological. While you're talking to Mediha, the noise in the cafeteria could drown out your words. Or someone could start talking to Mediha just as you make your request. That noise could distort your message to Mediha just as the noise of lawnmowers in spring could interfere with your classroom concentration.

Psychological noise includes emotional, intellectual, or psychological dissonance: it could include disliking a speaker, being concerned about something other than the message, having preconceived notions about an issue, or harbouring prejudices about the message or the messenger.

For example, Mediha has already studied extensively for the exam, and feels that you have not worked hard enough; Mediha feels overwhelmed by her part-time job; Mediha is worried about her uncle, who is ill; Mediha herself is not feeling well. In any of these possibilities, psychological noise will influence her decision, and her message back to you.

Channel overload occurs when the channel cannot handle all the messages that are being sent. Two people may be speaking to you simultaneously, or a small business may have only two phone lines so no one else can get through when both lines are in use.

Information overload occurs when more messages are transmitted than the human receiver can handle. Because of technology, information overload seems to be a constant modern complaint. Some receivers process information on a “first-come, first-served” basis. Some may try to select the most important messages and ignore others. A third way is to depend on abstracts or summaries prepared by other people. None of these ways is completely satisfactory.

At every stage, both Mediha and you can misper-ceive, misinterpret, choose badly, encode poorly, or choose inappropriate channels. Miscommunication also frequently occurs because every individual makes meaning using **different frames of reference**. We always interpret messages in light of our personal experiences, our cultures and subcultures, and the time in which we live.

Successful communication depends on identifying and establishing common ground between you and your audience. Choose information that your audience needs and will find interesting. Encode your message in words and other symbols the audience will understand. Transmit the message along channels that your audience pays attention to.

Correctly identifying your audience and then choosing audience-appropriate symbols (words, gestures, illustrations) guarantees a more accurate meaning transfer.

3. Audience and Business Messages

Consider the PAIBOC questions five of the six questions relate to audience:

P What are your **purposes** in communicating?

Your purposes come from you and your organization. Your audience determines how you achieve those purposes.

A Who is your **audience**? What audience characteristics are relevant to this particular message?

These questions ask directly about your audience.

I What **information** must your message include?

The information you need to give depends on your audience. You need to add relevant facts when the topic is new to your audience. If your audience has heard something but may have forgotten it, protect readers' egos by saying "As you know," or putting the information in a subordinate clause: "Because we had delivery problems last quarter,…" If your audience is familiar with specific facts, concentrate more on clarifying new information.

B What reasons or reader **benefits** can you use to support your position?

Regardless of your own needs, a good reason or benefit depends on your audience's perception. For some audiences, personal experience counts as a good reason. Other audiences are more persuaded by scientific studies or by experts. For some people, saving money is a good benefit of growing vegetables. Other people may care more about avoiding chemicals, growing varieties that aren't available in grocery stores, or working outside in the fresh air than about costs or convenience.

What **objections** can you expect your readers to have? What elements of your message will your audience perceive as negative? How can you arrange the message to overcome audience objections or de-emphasize negative elements?

Different audiences have different attitudes. One audience may object to a price increase. Another audience may see price changes as routine but be bothered by time constraints.

C How will the **context** affect reader response? Consider your relationship to the reader, the reader's values and expectations, recent organizational history and current morale, the economy, the time of year, the place and time of day, and any special circumstances surrounding the message exchange.

People, information, and organizations exist in a context. How well your audience knows you, how they feel about you and your organization, how well the economy is doing, even what's been in the news recently: all influence their response to your message.

What do I need to know about my audience?

You need to know everything that's relevant to what you're writing or talking about.

Almost everything about your audience is relevant to some message, but for any particular message, only a few facts about your audience will be relevant. These facts will vary depending on each communication situation (see Table 2.1).

In general, you need to use empathy and critical-thinking tools. **Empathy** is the ability to put yourself in someone else's shoes, to feel with that person. Empathy requires being audience-centred because the audience is not just like you.

Critical thinking involves gathering as much information as you can about someone or something and then making decisions based on that information.

You need to use your research and your knowledge about people and about organizations to predict likely responses.

■ Analyzing Individuals and Members of Groups

When you write or speak to people in your own organization, and in other organizations you work with, you may be able to analyze your audience as individuals.

Identifying Key Audience Characteristics for Messages

Message or Purpose	Audience	Relevant factors
Memo announcing that the company will reimburse employees for tuition if they take work-related college or university courses	All employees	1. Attitudes toward education (some people find courses enjoyable; others may be intimidated) 2. Time available (some may be too busy) 3. Interest in being promoted or in receiving cross-training 4. Attitude toward company (those committed to its success will be more interested in the program)
Letter offering special financing on a new or used car	Post-secondary students	1. Income 2. Expectations of future income (and ability to repay loan) 3. Interest in having a new car 4. Attitude toward cars offered by that dealership 5. Knowledge of interest rates 6. Access to other kinds of financing
Letter containing a meeting agenda and saying that you can bring your child along	Client	1. How well the client knows you 2. How much the client likes you 3. How important the agenda items are to the client 4. How the client feels about children 5. Physical space for meeting (room for the child to play)

You may already know your audience; it will usually be easy to get additional information by talking to members of your audience, talking to people who know your audience, and observing your audience.

In other organizational situations, however, you'll analyze your audience as members of a group: "taxpayers who must be notified that they owe more income tax," "customers living in the northeast end of the city," or "employees with small children."

Since audience analysis is central to the success of your message, you'll need to consider the following pertinent information about your audience:

- Their knowledge about your topic
- Their demographic factors, such as age, gender, education, income, class, marital status, number of children, home ownership, location
- Their attitudes, values, and beliefs
- Their personality
- Their past behavior

Prior Knowledge

Even people in your own organization won't share all your knowledge. Salespeople in the automotive industry, for example, don't know the technical language of their service mechanics.

Most of the time, you won't know exactly what your audience knows. Moreover, even if you've told readers before, they may not remember the old information when they read the new message. In any case, avoid mind-numbing details. If, however, you want to remind readers of *relevant facts* tactfully,

- Preface statements with "As you know," "As you may know," "As we've discussed," or a similar phrase.
- Always spell out acronyms the first time you use them: "Employee Stock Ownership Plan (ESOP)."

• Provide brief definitions in the text: “the principal (the money you have invested).”

• Put information readers should know in a subordinate clause: “Because the renovation is behind schedule,…”

Demographic Factors

Demographic characteristics can be objectively quantified, or measured, and include age, gender, religion, education level, income, location, and so on.

Sometimes demographic information is irrelevant; sometimes it’s important. Does age matter? Almost always, since people’s perspectives and priorities change as they grow older. For example, if you were explaining a change in your company’s pension plan, you would expect older workers to pay much closer attention than younger workers. And you would need to shape your explanation to appeal to that older audience.

Demographic data has certainly determined the sharp increase in small business start-ups devoted to personal services. For example, the North American concierge industry— providing services from housesitting to running errands—is thriving because it offers time to busy Boomers.

Business and non-profit organizations get demographic data by surveying their customers, clients, and donors; by using Statistics Canada data; or by purchasing demographic data from marketing companies. For many messages, simply identifying subsets of your audience is enough. For example, a school board trying to win support for a tax increase knows that not everyone living in the district will have children in school. It isn’t necessary to know the exact percentages to realize that successful messages need to contain appeals not only to parents but also to voters who won’t directly benefit from the improvements that the tax increase will fund.

Personality

Understanding and adapting to your primary audience’s personality can also help make your message more effective.

Personality and learning style assessment instruments can provide you with useful insights into your own and others’ behaviours. In his bestsellers *Secrets of Powerful Presentations* and *Leadership from Within,* business consultant Peter Urs Bender says that knowing your audience is key to communication success. Bender describes four personality types, and offers a free online assessment for readers to identify their type. Another popular assessment tool, the Myers-Briggs Type Indicator, uses four dimensions (introvert-extrovert, sensing-intuitive, thinking-feeling, judging-perceiving) to identify personality preferences:

1. **Introvert-extrovert**: the source of one’s energy. Introverts get their energy from within; extroverts are energized by interacting with other people.
2. **Sensing-intuitive**: how someone gathers information. Sensing types gather information step by step through their senses. Intuitive types see relationships among ideas.
3. **Thinking-feeling**: how someone makes decisions. Thinking types use objective logic to reach decisions. Feeling types make decisions that feel “right.”
4. **Judging-perceiving:** the degree of certainty someone needs. Judging types like closure. Perceptive types like possibilities.

Table 2.2 suggests how you can use this information to adapt a message to your audience.

You'll be most persuasive if you play to your audience's strengths. Indeed, many of the general principles of business communications reflect the types most common among managers. Putting the main point up front satisfies the needs of judging types, and some 75 percent of managers are judging. Giving logical reasons satisfies the needs of the nearly 80 percent of managers who are thinking types.

Values and Beliefs

Psychographic characteristics are qualitative rather than quantitative and include values, beliefs, goals, and lifestyles. Knowing what your audience finds important allows you to organize information in a way that seems natural to your audience and to choose appeals that audience members will find persuasive.

TABLE 2.2

Using Myers-Briggs Types in Persuasive Messages

If your audience is	Use this strategy	For this reason
An introvert	Write a memo and let the reader think about your proposal before responding.	Introverts prefer to think before they speak. Written documents give them the time they need to think through a proposal carefully.
An extrovert	Try out your idea orally, in an informal setting.	Extroverts like to think on their feet. They are energized by people; they'd rather talk than write.
A sensing type	Present your reasoning step by step. Get all your facts exactly right.	Sensing types usually reach conclusions step by step. They want to know why something is important, but they trust their own experience more than someone else's say-so. They're good at facts and expect others to be, too.
An intuitive type	Present the big picture first. Stress the innovative, creative aspects of your proposal.	Intuitive types like solving problems and being creative. They can be impatient with details.
A thinking type	Use logic, not emotion, to persuade. Show that your proposal is fair, even if some people may be hurt by it.	Thinking types make decisions based on logic and abstract principles. They are often uncomfortable with emotion.
A feeling type	Show that your proposal meets the emotional needs of people as well as the dollars-and-cents needs of the organization.	Feeling types are very aware of other people and their feelings. They are sympathetic and like harmony.
A perceiving type	Show that you've considered all the alternatives. Ask for a decision by a specific date.	Perceiving types want to be sure they've considered all the options. They may postpone coming to closure.
A judging type	Present your request quickly.	Judging types are comfortable making quick decisions. They like to come to closure so they can move on to something else.

Looking at values enables a company to identify customer segments. The Canadian-born Tim Hortons chain introduced a more diverse menu (croissants, muffins, soup, and sandwiches) to attract new fast-food clients and to appeal to its original, increasingly weight-conscious customers. Ranked as Canada's "best-managed brand," based on customer service, Tim Hortons continues to expand in Canada and internationally.

Eresearcher Mary Modahl's survey of 250 000 households found that online buying depends on psychographics: the consumer's attitude toward technology along a continuum from "profoundly suspicious" to "eagerly accepting."

Ford Motor Company's ebusiness transformation strategy depends on direct contact with consumers. Ford has partnered with Teletech, the consumer-marketing firm, to identify consumer preferences and trends as part of its business-to-consumer brand value enhancement. The company also sponsors interactive automotive sections on teen Web sites to cultivate and build relationships with future car buyers.[6]

Geodemographic data analyze audiences according to their location and spending habits. Postal code clusters identify current and potential customers based on two truisms: 1) people are what they buy, and 2) birds of a feather flock together: "…our shopping habits are shaped by environment and our desire to belong."

Every time we use credit cards or give our postal codes at the checkout, we provide data miners like Tony Lea, vice-president of Environics Analytics, with a snapshot of ourselves and our values. Lea uses that information to tell businesses how to find and reach their target markets. "He advises banks where to locate new branches, he knows which grocery stores should stock thin-crust pizza and he can design direct mail to [consumers'] tastes." Lea has even successfully advised a federal political party on how to appeal to undecided voters in specific neighbourhoods.

Past Behaviour

Human resource managers maintain that you can analyze and predict people's future actions based on their past behaviours; the more recent the behaviour, the more accurate the prediction.

Discourse Community

A **discourse community** is a group of people who share assumptions about what channels, formats, and styles to use, what topics to discuss and how to discuss them, and what constitutes evidence.

Lecture 5 ADAPTING YOUR MESSAGE TO YOUR AUDIENCE (CONTINUE)

1. *Analyzing people in organizations*
2. *Organizational culture*
3. *Different needs of audiences*

1. Analyzing people in organizations

Audience reaction is also strongly influenced by the perceptions and expectations of the groups to which they belong. These groups, or **discourse communities**, include family, peers, professional associations, clubs, and the workplace—all communities with which your audience identifies. Discourse communities are groups whose members create the affiliation, the rules and the norms, through discourse, or dialogue. Members communicate through symbols (language, nonverbals) that may or may not be exclusive to their group, but which identify them as members of that group.

Therefore, a discourse community is a group of people who share assumptions about their particular culture and values: what to wear; how to behave; what topics to discuss and how to discuss them; what channels; formats, and styles to use; and what constitutes evidence. Each person is part of several discourse communities, which may or may not overlap.

Consider your own discourse communities: perhaps you wear jeans to signify your membership in the student community; your hairstyle or piercing indicates your membership in a sub-culture; your iPod holds music that reflects your affiliation to another group. When you go for a job interview, you might cut your hair and put on more formal clothes to display the norms of the organizational culture you want to join.

2. **Organizational Culture**

An organization's **culture** is its values, attitudes, and philosophies.

Organizational culture (or **corporate culture**, as it is also called) is revealed verbally in the organization's myths, stories, and heroes, and non-verbally in the allocation of space, money, and power.

When analyzing an organization's discourse community, consider both non-verbal and verbal clues:

• What does the physical environment say about who and what are valued? What departments and services are front and centre? Where is the reception area located? What messages do the furnishings and decor send? How are visitors welcomed? Is the company mission statement prominent? What does the office space layout indicate about the organization's values? Where are the library, training rooms, gymnasium, and cafeteria located? How well are they resourced?

• Where do the managers work? Do bosses dress differently from other employees?

• How are employees treated? How are new hires oriented? How is employee performance recognized? What's featured in the company newsletter? How do people in the organization get important information?

• How do people in the organization communicate? What channels, formats, and styles are preferred for communication? Do they write a paper memo, send an email, or walk down the hall to talk to someone? How formal or informal are people expected to be—in their dress, on the telephone, in meetings?

• What do people talk about? What is not discussed?

• What kind of and how much evidence is needed to be convincing? Is personal evidence convincing? Do people need to supply statistics and formal research to be convincing?

An organization's **culture** is expressed through its values, attitudes, and philosophies. **Organizational** or **corporate** culture reveals itself verbally in the organization's myths, stories, and heroes, and non-verbally in the allocation of space, money, and power .

The following questions will help you analyze an organization's culture:

• What are the organization's goals? making money? serving customers and clients? advancing knowledge? contributing to the community?

• What does the organization value? diversity or homogeneity? independence or being a team player? creativity or following orders?

• How do people get ahead? Are rewards based on seniority, education, being well-liked, making technical discoveries, or serving customers? Are rewards available to only a few top people, or is everyone expected to succeed?

• How formal are behaviour, language, and dress?

• What behavioural expectations predominate? How do employees treat one another? Do employees speak in "I," "we," or "them and us" language? How do employees get organizational information?

Two companies in the same business may express very different cultures. Their company Web sites can offer some clues to those cultures. Royal Bank's standing as Canada's oldest bank is reflected in its corporate Web site: conservative dark-blue and gold colours and a few, metaphoric pictures. TD-Canada Trust's green and white Web site—implying a fresh approach—offers photos of young, happy people, apparently delighted by the products and services the bank provides.

Many companies describe their cultures as part of the section on employment. Job candidates who research the corporate culture to identify how their skills match with the company have a significant advantage in an interview. Researcher Jennifer Chatman found that new hires who "fit" a company's culture were more likely to stay with the job, be more productive, and be more satisfied than those who did not fit the culture.

Organizations also contain several subcultures. For example, manufacturing and marketing may represent different subcultures in the same organization: workers may dress differently and espouse different values. In a union environment, management and union representatives traditionally employ adversarial language to advance their own sub-culture's perspective while undermining the other's point of view.

You can learn about organizational culture by paying attention to communication clues and cues. For example, observe people and listen to their stories. Every discourse community and every culture creates and perpetuates meaning and membership through the stories their members share. The Sleeman's Brewery story, for example, is that the quality of its beer is the result of family recipes handed down through five generations. And McCain Foods continues to present itself as a "family business" culture, despite its 20 000 employees and multinational, global presence.

Conscious awareness of an organization's spoken and unspoken messages can provide you with important information on its values and norms.

How do I use audience analysis to reach my audience?

Use it to plan strategy, organization, style, document design, and visuals.

Take the time to analyze your audience; then adapt your strategy, style, and organizational pattern to your audience's needs. For paper or electronic documents, you can also adapt the document's design and the photos or illustrations you choose. For the best results, revise your message with your audience in mind.

Strategy

• Choose appeals and reader benefits that work for the specific audience .

• Use details and language that reflect your knowledge of, and respect for, the specific audience, the organizational culture, and the discourse community.

• Make it easy for the audience to respond positively.

• Include only necessary information.

• Anticipate and overcome objections .

Organization

• It's usually better to get to the point right away. The major exceptions are:

When you must persuade a reluctant reader

When your audience would see the message as bad news and you want to break the news gradually

• Anticipate and meet the audience's expectations of format: make the organizational pattern clear to the audience.

Style

• Strive for clarity and accessibility: use simple words, a mixture of sentence lengths, and short paragraphs with topic sentences.

• Use natural, conversational, personable, tactful language: avoid negative, defensive, arrogant, and "red-flag" words—*unfortunately, fundamentalist, liberal, crazy, incompetent, dishonest*—that may generate a negative reaction.

• Use the language that appeals to your audience.

• Use conversational language.

Document Design

• Use telegraphing: bulleted lists, headings, and a mix of paragraph lengths create white space.

• Choose the format, footnotes, and visuals expected by the organizational culture or the discourse community.

• **Photographs and Visuals**

• Photos and visuals can make a document look more informal or more formal. Carefully consider the difference between cartoons and photos of "high art."

• Use bias-free photographs. Unintentional cultural, gender, religious, and economic assumptions can offend readers and lose business.

• Choose photographs and illustrations that project positive cultural meanings for your audience. Middle-Eastern readers, for example, find pictures of barelegged and bare-armed women offensive and may also object to pictures of clean-shaven men.

• Do your research and audience analysis: some cultures (e.g., France and Japan) use evocative photographs that bear little direct relationship to the text. North American audiences expect photos to relate to the text.

3. Different needs of audiences

What if my audiences have different needs?

Focus on gatekeepers and decision makers.

When the members of your audience share the same interests and the same level of knowledge, you can use these principles for individual readers or for members of homogenous groups. But sometimes, different members of the audience have different needs.

When you are writing or speaking to pluralistic audiences, meet the needs of gatekeepers and primary audiences first.

Content and Choice of Details

• Always provide an overview—the introductory or topic sentence—for reader orientation.

• In the body of the document, provide enough evidence to prove your point.

Best Buy and Future Shop share the same parent company and offer similar products. Their customer demographic, however, differs. Future Shop is designed to attract a more up-scale customer.

Organization

• Organize your message based on the primary audience's attitudes toward it: give good news up front; provide the explanation before you deliver the bad news.

• Organize documents to make reading easy: provide a table of contents for documents more than five pages long so that your readers can turn to the portions that interest them.

• Use headings as signposts: use headings to tell readers what they're about to read and to connect ideas throughout your document. This strategy reinforces your credibility through unity and coherence. If the primary audience doesn't need details that other audiences will want, provide those details in attachments or appendices.

Level of Language

• Contemporary business communication uses conversational, semi-formal language. Use "I" and "you," and address your reader by name. Do research, however, to discover your reader's title preference (for example, Mr., Ms.).

• When both internal and external audiences will read the document, use a slightly more formal style and the third person; avoid "I."

• Use a more formal style when you write to international audiences.

Technical Terms and Theory

• Know what your reader knows; then provide only the necessary information. Use technical terms only if these will increase reader comprehension

• Put background information and theory under separate headings. Readers can use the headings to read or skip these sections, as their knowledge dictates.

• If primary audiences will have more knowledge than other audiences, provide a glossary of terms. Early in the document, let readers know that the glossary exists.

■ How do I reach my audience?

Effective messages make use of multiple channels.

Communication channels vary in

- transmission speed
- transmission accuracy
- cost
- efficiency
- audience impact

Your purpose, the audience, and the situation—*known as the communication context*—will all determine which and how many channels you choose

A written message makes it easier to do several things:

- Present many specific details of a law, policy, or procedure
- Present extensive or complex financial data
- Minimize undesirable emotions

Writing, however, often requires more time than speaking face-to-face. Furthermore, once you mail the letter, or hit Send, writing is "for the record." Your documents, including your e-mail messages, are permanent and potentially available to everyone.

When you do decide to write, use the channel that best meets the expectations of your audience. Email messages are appropriate for routine messages to people you already know. Paper is usually better for someone to whom you're writing for the first time.

Speaking is easier and more efficient when you need to do any of the following:

- Answer questions, resolve conflicts, and build consensus
- Use emotion to help persuade the audience
- Provoke an immediate action or response
- Focus the audience's attention on specific points
- Modify a proposal that may not be acceptable in its original form

Scheduled meetings and oral presentations are more formal than phone calls or stopping someone in the hall. Important messages should use more formal channels, whether they're oral or written.

Oral and written messages have many similarities. In both, you should do six things:

1. Adapt the message to the specific audience.
2. Show the audience members how they benefit from the idea, policy, service, or product
3. Overcome any objections the audience may have.
4. Use a good attitude and positive emphasis
5. Use visuals to clarify or emphasize material
6. Specify exactly what the audience should do.

Even when everyone in an organization has access to the same channels, different discourse communities often prefer different channels. When a university updated its employee benefits manual, the computer scientists and librarians wanted the information online. Faculty wanted to be able to read the information on paper. Maintenance workers and carpenters wanted to get answers on voicemail.

The bigger your audience, the more complicated channel choice becomes, because few channels reach everyone. When possible, use multiple channels. Also use multiple channels for very important messages. For example, talk to key players about a written document before the meeting where the document will be discussed.

Lecture 6 WHAT IS A RESUME?

1. *What is a Resume?*
2. *What is an Effective Resume?*
3. *What should go in a resume?*
4. *Resume Formats*
5. *Resume Keywords*
6. *Manager Resume*
7. *Sample Management Resume*

1. What is a Resume?

The aim of procuring education, or a particular skill set, is getting a good job. Many of us when enrolling for a particular course or training program, have a dream in our minds. We see ourselves at a particular position in that field, and wish to work with the best employer in that particular field. Besides your degree and grades, a very important aspect of your career is your 'Resume'. The employers, before seeing your grades, and meeting you in person, has a look at your resume. He/she screens candidates on the basis of these resumes. This makes it very clear, that your attempt to make your best impression on your prospective employer depends on your 'Resume'. Not all are good at writing a resume for themselves. Also, there are various styles and resume examples, based on experience, job profile, etc. For this, most of us refer to example resumes available online, and just pick up one randomly. This is where we go wrong. Choosing a resume without understanding its purpose might not let you create the right impression.

What is a Resume?

Here you will understand what exactly a resume is, as well as it will state the precise functions of a resume. In a very simple and a systematic way, it will help you in drafting a latest resume mentioning your relevant proficiency and talent.

A 'Resume' also known as 'Curriculum Vitae' or 'Bio data' is a document, which presents you and your qualifications, skills, abilities and goals in life, in front of the employer. Aren't these words big enough? Your career depends on these words, right? It summarizes the information in such a way that the reader or the prospective employer gets an idea about your educational, professional and personal details.

Purpose of a Resume:

A resume is used mainly for procuring a job. When an employer has some positions vacant, he/she has a job description ready. According to this job description, they search for resumes. The resumes that match the job description put down by the employer are considered first. In this job description, the employer mentions the age, qualification and skill sets required for that particular position. Any resume answering these queries would be preferred first.

This makes it very important that you present all your skills and abilities on your resume in such a way that it answers the employer's questions in terms of job requirement.

Writing a Resume:

When it comes to writing a resume, people tend to get confused due to many notions and myths. Some say that it should only be a one-page document, some say it should be in a particular format only, etc. As we said, these are 'myths'. If you have valid information, your resume can be of 2-3 pages; however, not more than that. Secondly, the example of resume is something that keeps updating, and you can change your resume format as you keep adding to your work experience and achievements. You can also make use of resume samples in order to write an effective and job winning resume.

To help you write a better resume for yourself, here are a few tips listed below:

- **Contact details:** The header of your resume should have your name and contact details mentioned clearly. Make sure that you mention the updated contact number and do not change your number frequently. The employer would not take much efforts to contact you if you are not reachable in 1-2 attempts.

- **Segregation:** The segregation of your resume in different sections with proper headings given to each section helps in presenting the information in a systematic manner. This makes its simpler for the employer to skip to the section of his/her interest.
- **Plan:** Plan what you need to include in your resume. Do not include every piece of information. Also, make sure that before sending your resume you read the job description of the post you are applying for so that you can enhance your resume accordingly.
- **Proofread:** A resume with spelling mistakes and grammatical errors would prove to be very disastrous. Such mistakes are not acceptable in a resume.

Understand the types of resumes. Refer to the example resumes, pick some styles or resume formats you like, and using the tips that help you write a good resume, write that perfect resume for yourself. After all, who else better than you can pen down a resume that represents you and your skills.

2. What is an Effective Resume?

Each one of us has goals set for different phases of our life - good schooling, good degree, good job and a well-settled career for a settled life. A well-settled career is thus important to live a peaceful life. To get a good job, we not only need good education and skills, but we also need to present the same successfully. The employer cannot understand your potential unless you present it to him/her. Now when it comes to presenting, one cannot start giving a speech about his/her skills and qualifications. They need to list it down systematically, in a document known as a Resume. A resume is thus a systematic account of one's educational and professional skills, put forth in a way that it helps the applicant get a good job. However, not all resumes get the needed attention.

To make your resume impressive, you must know what the employer expects from a resume, or what he/she does on seeing a resume. The answer to these questions is as follows:

1. You send your resume to the employer. However, the employer does not get only one resume; rather he/she gets many such resumes everyday. Thus, any mistake in the resume or trying to cajole the employer via a cover letter can be easily understood by the employer. He/she knows all about a perfect resume, and thus cannot be fooled.
2. When they get so many resumes, they cannot afford to read every resume completely. Thus, they just take an overview of the resume, and they are so good at it that with a glance they can short-list the resume.

These are the two most important points to be remembered. The employer thus needs a resume that gives an answer to all his/her questions, within a few seconds. The recruiter has every right to get rid of your resume, reject your candidature, and does not even need to give you an explanation.

We have highlighted the problem above. In the coming paragraphs, we will thus provide you with a solution. To help you make your resume more impressive, read the checklist for resumes given below.

Checklist for resume to clear the resume screening round:

1. **Keep it Precise**:

As mentioned above the employer does not have all the time in the world to read your resume. An ideal resume should thus be a maximum of 2 pages, 3 in case of a highly experienced individual. If your resume has more than 3 pages, it would probably end up in the trash bin. The employer would not turn pages to get his/her required information.

2. **Legible**:

Would you like to read something that looks clumsy, and gives trouble to your eyes? No. Similarly, the employer would not read something that is not legible and easy to read. Do not try to clutter everything. Include only what is needed to make your resume look neat.

3. **Jargons**:

Including keywords like - degrees, skills, software used, techniques used, etc., is essential. However, only using such jargons is not useful. You might be an Automobile Engineer, but the recruiter might be an Arts graduate with an MBA in Human Resources. Understanding these jargons is thus difficult for him/her. Mention these jargons, but try to explain it in simple language.

4. **Design and fonts**:

You might be excited to use some of the best and latest fonts, good page borders, etc. However, it is a strict advice to curb these ideas. The resume is a professional document, and thus has to be kept simple. Some fonts might look great, but should never be used for formal writing. Times New Roman and Arial are the preferred fonts, and are quite legible.

5. **Customized resume**:

Your resume can be customized for every job that you apply for. Your basics remain the same, but the way you present the information should change with the company you wish to apply, and the requirements put forth in the advertisement.

6. **Portray yourself as a strong candidate**:

An employer usually will not like a person who is dependent on others for every task. He/she would prefer a person who can take his/her decisions, solve problems, etc. Portray yourself as a problem solver, rather than an information seeker or a help seeker.

7. **Number Speak louder than words**:

Try to use numbers to put forth your achievements. Mentioning 'over achieved targets' and mentioning 'achieved 150% of the target' makes a big difference. It promptly highlights your achievements and quantifies it.

8. **Salary**:

Do not mention the current or expected salary in your resume unless asked for it. You might lose a good opportunity because of a high salary demand, or even miss out on a good salary because of your low expectations.

9. **Personal Information**:

Personal information like marital status, religion, nationality, children, etc., need not be included in your resume, unless asked for. Hobbies should also be avoided. However, if your hobbies relate to your work, you can mention the same.

10. **Proofread**:

Check your resume twice or thrice for spelling or grammatical errors. You can also request your friend or colleague who is good in written communication and grammar, to review it once for you.

3. What should go in a resume?

You see a good job advertisement and wish to apply for the same. You sit down to write a good resume. However, you get stuck at some point, and start wondering what information should be included in the resume. You cannot mention everything in the resume, and thus you need to be sure of what should be the content of your resume.

The resume content plays a major role in the selection of your resume for further rounds. Sometimes you might be the most apt candidate for a particular position, but your resume fails to portray the same, and you might lose a good opportunity. Thus, the information portrayed in your resume is very crucial. In the succeeding paragraphs, you will get the answer to - 'What should go into a resume'?

Content of a resume:

1. **Name and Contact Details**:

Your resume begins with your name and contact details. The name mentioned on your certificates, banks accounts, etc., should be mentioned in your resume. Do not change the spelling of your name or add something to it, because besides introduction, it also serves the purpose of verification.

Write your name at the center of the page in a font larger than the rest of the text, and highlight it by using the 'bold' option. The email address and postal address should be written below the name, followed by the contact number.

For example:
Ishaa Sherlock
isha.sherlock@mail.com
Futschia Towers, 101floor, Apt no. 101-A
Downtown, California- 36
Ph: 111 2323232

2. **Career Objective**:

A two-line summary of your career goals will help the employer understand your professional aims, and thus analyze you more perfectly.

For Example:

'Willing to work with an organization wherein I can use the expertise and skills gained in 3 years of work experience, to help make a difference to the organization and train the budding talents in the organization.'

Here the applicant puts forth that he/she would like to work in a position that gives him/her the freedom to use the expertise gained over the years, and probably handle a team of people and train them in the same.

The applicant thus, smartly puts forth, that he/she would like to work at a comparatively senior position.

3. **Career Summary**:

A 2-3 lines summary of your career to give an overview of your career to the employer.

For example:

'Working as an Asst. Manager Sales with Self Tech for 3 years, developed marketing skills that helped me bring in 8 new clients for the organization, which added to the revenue by 30%. Also, developed a strong sales team by recruiting the best of the talent'.

4. **Academic Qualifications**:

Mention your academic details, beginning with the most recent degree. Do not mention grades of every year of your qualification. Mention the details of your PG courses, Bachelors degree, high school grades and some professional diplomas.

For example:

Masters in Mechanical Engineering - Grade A (2010)

Bachelors in Mechanical Engineering - Grade B (2008)

Diploma is Tool Design - Grade B (2008)

St John's High School - Grade A (2005)

Academic Achievements - This will be a sub-heading in the academic qualifications segment giving details about your academic achievements.

5. **Work Experience**:

This is the most important section of your resume. It is very important to mention your past work experiences, beginning from the latest. Mention the work responsibilities clearly, using bullet points.

For Example:

1. JJ Mechanicals - 2010 till date
2. Designation - ____________
3. Work responsibilities:
1. __________
2. __________, etc
4. Marks Machineries (2008-2010)
5. Designation: ______________
6. Work responsibilities:
1. _______________
2. _______________, etc.

Mention all your employers in a reverse chronological order.

Achievements - This will be a sub-heading in this section mentioning your work place achievements.

6. **Skills and Interests**:

Mention your career skills using bullet points. Also, mention the interests in the subsection. Try mentioning interests that relate to your field or job. Do not mention unnecessary interests, for example a Finance Professional might mention 'Vedic Math' as an area of interest because it relates to his/her field.

The skills could be categorized into different sections, like -

Professional skills- Mentioning the skills pertaining to the job only Interpersonal Skills - Mentioning your communication and socializing skills Computer Skills - Mentioning your computer skills

Managerial Skills - Mentioning skills required for working at a senior position like team lead or manager

This completes the content of your resume. However, you should also know what not to include in your resume. Let us discuss about the same in brief:

1. The aspects of your last job or employer that you disliked should not be mentioned anywhere in the resume or the cover letter. This might portray you as a pessimistic person.
2. Do not include irrelevant job experiences. If you worked in the sales department and now wish to be a writer, mentioning the sales job experiences will not help you. It might in fact portray that you are not sure of what you wish to do in your life.
3. No need of bringing your sexuality or gender into picture. It does not affect your work performance.
4. Religion discrimination is again a taboo for resumes. Mentioning your religion is not advisable in America. It is irrelevant to the job, and at times can prove to be controversial.
5. No need of mentioning every job that you take up since your school days. You might have taken up many part time jobs but do not mention all of them. Mention jobs that you begin your career with, probably after completing your education.
6. Providing any pseudo information could affect your career in a bad way and might lead to black listing of your profile by some employers.

Using these instructions plan your resume content carefully to make it the most effective out of all the resumes the employer receives for a particular job.

4. Resume Formats

Each one of us has many skills, degrees, certificates, etc. When we apply for a job, we cannot start narrating the same to the employer. We need to present it systematically, and in a way that the most important and relevant information reaches the employer. Thus, one needs to pen down everything in a systematic and precise manner. This systematic documentation of one's qualifications, professional experiences and skill sets is known as a Resume. The resume is used for screening the job applicants and thus calling up the most professional candidates for an interview. Let us discuss about resumes and types of resumes to help you draft one for yourself.

Today there are 'n' number of search engines offering different sample resumes, resume templates, professional resume writing services, etc. However, before choosing one, you must know what your resume should be like, and what the different types of resumes are.

Wonder why there are different types of resumes. The purpose of the resume is to provide information about your professional details and skill sets. Basically, there are three main types of resumes. These are:

1. Reverse Chronological Resume
2. Functional Resume
3. Hybrid Resume

Besides these, there are some other types as well, but these three types of resumes are more commonly used. Let us discuss in detail about these.

1. **Reverse Chronological Resume**:

- As the name suggests, this resume provides an account of the individuals work experiences and qualifications in a reverse order (starting from the latest) and giving details of about past 10-15 years.
- The work experiences or the positions held are written with the start and end dates.
- This type of resume is usually suitable for people who have considerable work experience. It helps the applicant illustrate his/her career growth path.
- Candidates who have taken gaps in their career should not opt for this type of resume, as the dates make the gaps more visible and this could lead to a negative opinion.

2. **Functional Resume**:

- This type of resume focuses on skills and work experience sorted based on the job function
- This resume focuses on the skills that are most relevant to the position sought by the applicant. It emphasizes on professional capabilities making use of experience summaries to communicate about professional competencies. The chronological type of resume just allows you to list the information. However, this type of resume helps you elaborate on your professional competencies.
- It is suitable for candidates who have worked in varied fields and positions, opted for career change, and have a little work experience.
- This resume is also preferable for jobs wherein the applicant must possess particular skills or particular personality traits

3. **Hybrid Resume**:

As the name suggests, this is a combination of the above-mentioned resume types. It takes the best from the two, and helps an applicant to list his/her skills, and also provides information on the work history in a chronological order. The job skills are listed first, followed by the chronological work history.

These are the three main types of resumes. However, with the advent of internet and varied demands of the employer, there are some other types like- targeted resume, mini resume and online resume also. These are more or less like the above-mentioned three types, and thus are not specified. Let us discuss in brief about the same.

4. **Targeted resumes**:

This resume is customized as per the job requirements and the position one is applying for. After reading the job advertisement or the job description thoroughly, the candidate decides on what should be included in the resume. Writing a Targeted resume requires more efforts than a simple resume, because here the applicant needs to analyze the employer's job requirements, and thus present his/her skills and expertise accordingly.

5. **Mini Resume**:

This is again used when asked for. Sometimes the employer mentions that he just needs some specific details, and one has to submit a mini resume. It just gives an overview of your resume.

6. **Online Resume**:

Last but not the least, is the online resume. Usually we send our resumes via email. Employers do not ask for hard copies of resumes before meeting the candidate in person for an interview. The most preferable format for online resumes is the MS Word - 97 - 2003. Some others request to send in PDF, ASCII or HTML format only.

5. Resume Keywords

The employers use job search engines to find resumes that suit their requirements. In these search engines, the resumes are filtered based on specific keywords that the employer would use, to filter his/her search. An example of such filtering would be as follows:

The employer searching resumes for the position of Manager would use the following words to filter his/her search -

MBA

Work experience - 5 years

Marketing, etc.

The search engine thus produces results as per this search and presents the resumes that include these words. Thus, keywords help you clear the filtering of resumes.

Now you can clearly understand the difference between the types of resumes, and probably would be able to judge which resume suits your profile the most. Reading a few examples of resumes would help you understand the difference further.

Your resume is your mirror image. Do not go wrong with it, if you wish to have a great career. Read, understand and draft a resume carefully. Go through it twice before sending it across, and success will be all yours.

Resume Action Verbs

A resume helps you present yourself to the prospective employer. While using your resume as a tool to fight the opponents in the job market, you put forth many skills and activities taken up by you at your work place, and during your academics or internship. The way you mention these skills or responsibilities makes a huge difference. Here 'action verbs' come into picture. There are certain resume action verbs that boost your resume by presenting your responsibilities and skills effectively. To know how to use these verbs in your resume, you must know what action verbs are.

What are action verbs?

These are words that portray action, an activity taken place, or an activity undertaken by you. In a resume, when you mention a list of skills and responsibilities in bullet points, it might not prove to be effective. On the other hand, when you justify how you use your skills using these action verbs, it is easily noticed and is more effective.

How to use action verbs?

1. When you write your job responsibilities or responsibilities undertaken during your academic years, action verbs can be used
2. List 4-5 responsibilities you wish to mention in your resume under the particular job title or role
3. In each sentence, there is a main verb. For example 'Working as a Team Lead, I managed my team, maintained team records, and motivated my team for achieving their targets'. In this sentence, the main verbs are 'managed, maintained and motivated'.
4. For using action verbs the sentence will be refromed by omitting the first person usage, and beginning the sentence with the correct action verb, for example -

Managed a team of 12; Motivated the team towards achieving targets', etc. Here your action is mentioned, you contribution in the work is mentioned; thus, making the sentence more effective.

To help you understand the usage of these verbs, we have jotted down a list of action verbs as per different job profiles, and would discuss the same with a few examples.

1. **Clerical Skills**:

Some positions like Administrative Assistant, Accountant, etc., need to possess certain clerical skills. Their work responsibilities are such that these skills are used in their work routine. Action verbs help to put forth the same effectively. A few examples are as follows:

- Arranged - Arranged meetings amongst department heads
- Compiled - Compilation of employee details
- Implemented - Implemented computerized accounting methods
- Organized - Organized conferences and events in the organization
- Screened - Screened the email received via home page
- Monitored - Monitored the muster, and employee in and out timings
- Prepared - Prepared annual reports
- Processed - Processed data using Data Mining tools
- Executed - Executed disciplinary rules as ordered by the School Chief
- Collected - Collected information using the primary survey method
- Validated - Validate applications received in the accounts department

Some other verbs are –

Approved
Cataloged
Dispatched
Inspected, etc.

2. **Communication skills**:

Some jobs need exceptionally good interpersonal and communication skills, such as that of a Spokesperson, Marketing personnel, Trainer, etc. In these cases, it is essential to project your responsibilities wherein you have used your communication skills. A few examples are as follows -

- Addressed - Addressed the audiences at the Entrepreneur Summit
- Promoted - Promoted services of Taj Presidency successfully
- Directed - Directed employees, as per the plan of action
- Negotiated - Negotiated for my client with vendors
- Interpreted - Interpreted the reports and communicated the same

Some other examples are –

Edited
Wrote
Authored
Mediated
Influenced
Lectured
Publicized, etc.

3. **Research Skills**:

To work as an Analyst, or to plan the strategies of the organization, one requires specific research skills, and in a resume, these skills need to be highlighted effectively. A few examples are as follows:

- Diagnosed - Diagnosed patients
- Inspected - Inspected processes of the plant
- Examined - Examined the quality of products
- Analyzed - Analyzed data collected in the survey
- Formulated - Formulated new research techniques

Some other examples are –

Extracted
Examined
Interviewed
Reviewed, etc.

4. **Management Skills**:

Management skills are highly important in the professional work environment. One might not work at the management position, but still he/she has to manage his/her work, and thus make use of management skills.

- Supervised - Supervised the packaging unit
- Assigned - Assigned responsibilities
- Coordinated -Coordinated with clients and the manufacturing unit of the organization
- Achieved - Achieved targets set for the team
- Planned - Planned promotional activities
- Scheduled - Scheduling and organizing team activities

Some other examples are –

Chaired
Delegated
Oversaw
Strengthened
Recommended
Administered, etc.

5. **Creative Skills**:

Creative skills are a must for jobs like authors, actors, designers, animators, etc. Their work totally depends on the creative skills they use. A list of action verbs for such skills is as follows -

Conceptualized - Conceptualized the advertisement campaign for Wine Tree
Designed - Designed costumes for J. Paul's show
Performed - Performed at the International Ballet Event
Acted - Acted in Bay Watch
Directed - Directed Food Tech, Sliced, etc.

In a similar way, one can use action verbs and put forth one's skills and abilities. The examples given above makes it very clear that by starting a sentence with an action verb, one can put forth his/her skill or responsibility effectively.

A few more action verbs that you can use for your resume are given in the table below.

Audited	Assessed	Motivated	Initiated
Balanced	Assisted	Revitalized	Translated
Budgeted	Counseled	Evaluated	Reconciled
Projected	Guided	Instructed	Invented
Computed	Represented	Coached	Integrated

Use these action verbs and make your resume more impactful and effective.

6.Manager Resume

A Manager in every company plays an important role. The position itself means a person who is responsible to manage the given responsibilities. He/she has a prominent role to play in the dealings of the management. He is responsible for getting the work done by the people who are working under him. All the important functions related to planning, directing, controlling and staffing are managed by the managers. A Manager is responsible for the efficiency and growth of an organization. He plays varied roles, and is questioned in both the cases of profit and loss of the organization. So, while writing a Manager's resume, you need to mention all these qualities, because they are very essential for this job. Every company looks at the qualities which a Manager should possess, and so it is essential to be found in your resume. You also need to be careful while writing your resume, because this is your first impression in the mind of the employer.

A manager's job is not easy; rather it is complex and requires many skills and qualities. It is a job of managerial level, and includes many responsibilities that a manager has to fulfill. They are not only responsible for their personal work, but they also need to motivate the team which is working under him. He has to get the best out of the team, with the help of his technical and conceptual skills. A manager should have the knowledge of different sectors such as accounting, manufacturing, computers, etc. He should be a self motivated person and should be enthusiastic as well, so that he could motivate the other members of the team.

Skills Needed in a Manager

There are various skills that are needed to be present in manager resume.

Leadership qualities and team player: A manager needs to have good leadership qualities in order to get the work done by his team. He should be a good team player as well, to cooperate and coordinate with his team.

Decision making skill: This is one of the most important qualities that a manager should possess. He has to take quick and correct decisions, so he should be smart enough to take the correct decision. There are times when a Manger has to take quick decisions and the decision should be correct and in the benefit of the company. So, a Manager should have these skills present in him.

Analytical skills and problem solving skills: He should also possess good analytical, as well as problem solving skills. There are many such problems which a manager can face in his job profile, so it is necessary that he should possess these qualities.

Able to handle the team: The job of a manager is not limited to himself; in fact, he handles a team under him. In order to get an effective result, he should be able to handle the team effectively. He needs to motivate his team time to time for better results. This is one of the most important skill that a Manager should possess. An employer always checks this skill in a candidate that whether he is able to handle a team of people under him or not.

Work under pressure: There can be various situations under which a manager has to work. These situations can be complex and diverse. So, he needs to survive and act effectively when such situations arise.

Knowledge of work at managerial level: A manager works at the managerial level. He should be smart enough to handle the complexities at his level. He needs to manage a team and coordinate with upper management. So, he needs to have proper knowledge of his designation and responsibilities.

Thus, a manager should have the qualities and skills mentioned above. He has to manage the responsibilities that are given to him, and for this purpose, he needs to have the skills mentioned above.

7.Sample Management Resume

Thaddeus J. Albert
1616 Deans Lane
New York City
Ney York – 10011
United States
Tel: (914) 798 5729
Email: thaddeus.albert@youremailid.com

Career Objective

Looking for senior management position with challenging opportunities, where I can utilize my experience as a manager and contribute towards the organizational growth; by helping to achieve the organizational goals, along with personal development.

Skills Summary

I am a Marketing professional with 10 years of experience, and extensive comprehensive exposure across different marketing profiles. My key skills include expertise over competitive marketing strategies with managerial experience, and imbibed ability to lead a team of marketing professionals towards successful achievement of organizational goals.

Work Experience

- **Marketing Manager** (2006 - till date) **Integrated Marketing Solutions**, 333 Mangrove Avenue, White Plains, New York

Job Responsibilities:

- Plan and execute the marketing plans
- Identifying prospective clients and establishing strategic alliances

- Manpower planning
- Developing training plans
- Conducting market research and identifying the growth opportunities
- Competition analysis and corrective measures
- Conducting performance appraisals
- Organizing promotional events
- Execution of management policies

- **Assistant Manager Marketing** (2003 - 2006)
Mountain Brook LLC, 103 Venus Apt, Poughkeepsie, New York
<u>Job Responsibilities</u>:
  - Execute the management strategies
  - Coordinate with other departments for smooth operations
  - Monitor performance of marketing executives on a daily basis
  - Meet the clients for promoting business alliances
  - Allocate duties and responsibilities to team members
  - Assist the Marketing Manager with performance appraisals and other related activities
  - Conduct training sessions for new joiners, and as per the requirements
  - Conducting market survey for providing feedback to management
  - Ensure compliance to organizational policies and standards by all employees
- **Marketing Team Leader** (2001 - 2003)
Blue Ridge Hotels, 591 S, 18th Avenue St, Brooklyn, New York
<u>Job Responsibilities</u>:
  - Ensure targets are met consistently
  - Induction of new joiners
  - Impart product knowledge to employees and train them on marketing skills
  - Maintain records of daily marketing and sales activities
  - Assign geographic areas for sales executives
  - Monitor the daily performance of team members
  - Visit VIP clients along with sales executives
  - Coordinate with other teams for meeting departmental goals
  - Identify training needs for employees and coordinate with Marketing manager for the same

Academics Qualifications

- **Degree/Course**: MBA (Master's In Business Administration), Marketing specialization
University/College: Blanton Peale College, Columbia Rd, NY
Year: 1998 - 2001
- **Degree/Course**: BBA (Bachelor's in Business Administration)
University/College: Sanford Brown Institute of Business Management, Hicksville, NY
Year: 1995 - 1998

Professional and Personal Skills

- MS Office
- Business Writing Skills

- Market competition awareness
- Quick decision making ability
- Analytical skills
- Leadership skills
- Interpersonal skills

Personal Details:

Passport: Yes **Notice Period**: 90 days **Willing to relocate**: Yes	**Valid Till**: 2nd December, 2020

References

References would be provided only on prior request.

Declaration

I, Thaddeus J. Albert, confirm that all information shared above is correct and true to the best of my knowledge and belief.

Signature: ####

Place: New York City **Date**: 2nd December, 2011

LECTURE 7 WHAT IS A REPORT?

Let's begin with two dictionary definitions of a report:

"A formal statement of the results of an investigation or of any matter on which definite information is required, made by some person instructed or required to do so."

(Oxford English Dictionary)

"An account prepared for the benefit of others, especially one that provides information obtained through investigation."

(Collins English Dictionary)

These definitions can help us to identify the key criteria for a report, which are:

– Formal - following an established form or convention.

– Factual - containing information obtained through investigation.

– For the benefit of others - supplying the reader with the information he or she needs in a form he or she can understand.

– Requested - either expressly or implicitly.

Business reports are written to communicate facts and ideas to others. Without facts and ideas, without data on costs and expenses, and without statistics that indicate trends, business could not operate. The flow of information and ideas is necessary for business executives to make their decisions. The quality and accuracy of their decisions determine the future of the company. To make sucessful decisions, executives, managers, and supervisors rely heavily on the information that is reported to them.

Information is reported on all levels of business. The board of directors studies the report from presidents and vice presidents, who in turn rely on reports from their department heads and assistants. Managers and supervisors rely on reports from their sales staff, their accounting department, and so on. The information reported may be complex and detailed, or it may be simple and straightforward.

The format, contents and purpose of reports vary a lot. A report could be, for instance:

– a pre-printed form, which the report writer completes by answering a series of questions;
– a memo;
– a précis of another report;
– a technical report: informational, analytical and so on.

Defining the purpose of the report you have been asked to produce is essential as the first stage in its preparation and successful conclusion. You need to know why you are writing the report. You may find it helpful to ask yourself the question - “What is the purpose of this report?” Will it be to INFORM, to INSTRUCT, to INFLUENCE, to INTERPRET or to INTEREST?

Let’s take a look at each of these in turn:

Purpose of Report	**Examples**
INFORM	– Circulate new policies/ideas. – Inform others of work done/progress made. Specific example: Providing update on the progress of a project.
INSTRUCT	– Tell others how to put new policies into practice. Specific example: Explaining how a new system will operate.
INFLUENCE	– Sell your ideas and persuade the reader to make a decision. – Recommend a course of action. Specific example: Selling the benefits of the start up of a new project.
INTERPRET	– Assess a situation. – Draw conclusions. Specific example: Analysing the performance of your company from the latest company report.
INTEREST	– Use the presentation to appeal to a wide audience. Specific example: Summarising the findings of a market research project.

Every report will serve at least one of these five purposes. Since they all begin with the letter "I" you can remember them as:

The FIVE I's

Before you begin each new report always bear in mind the five "I's" and ask yourself "Is the purpose of this report to inform, instruct, influence, interpret and/or interest?"

Drawing up the specifications

Sometimes the person writing a report does not have a clear idea of what type of report is required. Clear, agreed instructions are the foundation upon which you build your report. Instructions define the scope of your report and the lines you are required to follow. They outline the areas you must consider and the restrictions you must observe. If you don't obtain specific instructions before you start, you could waste a lot of time and effort.

We can illustrate this important point with an example. Jane Green the newly appointed Head of Administration, asks Peter Smith, a Section Supervisor, to "prepare a report on the company's fire precautions". Peter doesn't want to give his new boss the impression that he isn't completely efficient by asking for any further details. So he agrees and goes back to his office, feeling vague about what he is supposed to do. Should he write about:

– the adequacy of the company's existing fire-fighting equipment?
– the frequency and extent of fire drills?
– a review of the alarm system and the instructions given to staff?
– a survey of fire escapes?
– consultations with the local fire service?
– review of the complete fire precautions system and recommendations for improvements?

You can see that the amount of work required will obviously vary considerably between these options. Peter will waste a lot of time if the information he produces is not required.

But rather than risk Jane thinking him inadequate if he asks her questions, Peter decides to do a really thorough job. He decides to carry out a review of the complete fire precaution system. He also investigates the purchase and installation of the latest "state of art" equipment.

Two days later Jane asks for the completed report. Peter thinks she is an over-demanding boss, because he could never complete such a comprehensive task in two days. Jane thinks he is slow because he should have been able to finish it in 24 hours.

When Peter finally does finish his review and presents his report two weeks later, Jane is amazed because what she wanted was:

How many new fire extinguishers were needed to meet "Health and Safety" standards following the extension to the company premises, and what was the most competitive price they could be bought for!!!

The message for Peter Smith, and for all of us is:

If someone asks you for a report, make sure you get a proper briefing. If anything is not clear, don't make assumptions, ask questions. If you don't ask questions at this stage you could look a fool later if you produce a report that is not wanted! Asking relevant questions is the mark of a good report writer, not a fool.

Here is a checklist of key questions you should ask and have answered:

A. What is the subject of the report?

– What angle should I take?

– Are there any aspects in particular you want me to concentrate on?

B. What is the purpose of the report? (refer back to the previous section)

Inform - Is this report intended to give information?

Influence - Is the report intended to analyse alternatives and make recommendations to the reader to help towards a decision?

Interest - Is it intended to arouse interest or enthusiasm?

Interpret - Is the report intended to analyse facts?

Instruct - Is it intended to give instructions?

C. Who is the report intended for?

– What do the readers already know?

– What do they need to know?

– What are their attitudes?

– What do you want them to think/do after reading the report?

D. How long should the report be?

– What degree of detail should I go into?

E. What information is already available?

– Do you have any information which you particularly want me to include in the report?

F. What is the timescale?

– When must my report be completed by?

– Does the time allocated match the amount of work involved?

– What additional resources can I draw on?

The secret of successful report writing is a systematic approach and you must complete this stage before you do anything else. Otherwise you could make the same mistakes as Peter Smith.

Your next step is to arrange with the report commissioner to spend some time going through each of these questions for the report you have agreed to write. Fix the time and place for the meeting that will allow you to cover all the questions. Don't forget to make notes.

Your questions are designed to form the basis of a discussion to help you and report's commissioner. So be careful not to conduct the meeting like an interrogation.

Structure of reports

Reports vary considerably in their contents, but they all have commonly recognized parts. The following information, which is suitable for a wide variety of subjects, covers the items that may appear in reports:

Preliminary Sections

Cover

Flyleaf

Title page

Copyright page

Letter of authorisation

Cover letter

Preface or Foreword

Acknowledgements

Table of contents

Summary

Main part of the report

Introduction

Body of the report

Conclusions

Recommendations

Supplementary material

Appendices

Bibliography

Glossary

Indices

The pages of preliminary material are assigned lowercase Roman numerals, beginning with ii on the first page after the title page of a report that is typed on one side of the paper. The report and the supplementary material are assigned Arabic numerals beginning with an optional 1 on the first page or a necessary 2 on the second. If a report has chapters, the number assigned the first page of each chapter may appear or not as the writer wishes.

Each part of a report is discussed in the following sections. Some of the preliminary and supplementary sections are optional. Some are so similar that only one of the pair need be used.

Preliminary sections

Cover. The cover of a report contains the title and the author's name. Optional additions are a security classification, the date of the submission of the completed work, and if the report is one in a series, the title of the series. Covers may be paper of higher quality suited to harder use than typing paper.

Flyleaf. Favoured by writers, a flyleaf is a blank page, sometimes of paper of higher quality than is used for the rest of the report, sometimes containing a decorative background design. It is, of course, optional. We have not seen a flyleaf in any unpublished papers, particularly in scholarly reports. It is too fancy for typewritten papers.

Title page. The title page usually incorporates the following:

1. <u>The Title</u>. It should be brief, but it should convey the subject of the report, e.g. *"Introducing Flexible Hours into Head Office - Addressing Concerns"*.
2. <u>The Author's Name</u> and his/her position and qualifications, e.g. Ann Smith, Head/Personnel Department.

3. The Distribution List. A list of the people, or groups of people, who are to receive the report. For example, the model report is to all departamental heads.
4. The Date on which the report is presented. E.g. 17 June, 2000.

Other items that might be included are the approval signature and date, the revision date, the series number, the security classification, and the number of the contract.

Copyright Page. This page is noted in books on the back of the title page as follows: date of copyright, name of the holder of the copyright, and a statement like *"All rights reserved. This book or any part thereof must not be reproduced in any form without the written permission of the copyright owner".*

Letter of authorisation is necessary if the terms under which the study was made should be recorded. It is written by the person who requests or orders the study to the person who is to be responsible for the work and the report. Some letters of authorisation contain detailed suggestions or instructions for the work; most do not.

Cover letter. A cover letter may be separate from the report. If it takes the place of the preface, it becomes part of the report. Cover letters may be addressed to the person or group that authorised the report (this letter becomes part of the report), to a special reader in order to call attention to subjects of interest to that reader (this letter is not part of the report), to a reader who has requested a copy of the report (this letter is not part of the report). Cover letters may be needed when action is requested of a reader, when reports are sent to the divisions of a company, when writers wish to remind readers of their previous connection with the project or with the writers.

A cover letter may include the main points of the report, the scope, the material of interest to the reader or readers addressed, acknowledgements, the need for and use of the report, major conclusions and recommendations, personal comments of the writer. It should not have the same wording as the summary (abstract).

Preface or Foreword contains the same or similar information; therefore only one need be used, although occasionally works have both. A foreword is written by someone other than the author who knows and is willing to admire publicly the author and his or her work. A foreword may include the background of the development of the report, the report writers' qualifications, the introduction of the subject to the readers, references to related literature, evaluation of the work. A preface is written in a personal style by the authors and may include any of the material appropriate for the foreword, the authors' reasons for writing, their ideas about using the report, and their acknowledgements of help given by people and organisations.

Acknowledgements, however, are best presented in a separate section. Removing them from the other material or a preface gives acknowledgements more importance and is therefore more generous. This section should be revised with extra care to be certain that names are spelled correctly and titles are given accurately. Acknowledgements are, of course, optional except when writers must recognize the financial contributions of persons or organizations. It is wise to have the organization or person or both approve the expression of gratitude. We can think of occasions when for one reason or another acknowledgements have come as unpleasant shocks to those named.

Table of contents should give the main sections of the report in the order in which they appear, together with their page reference. Table of Contents is essential for long reports or major topics, but is not necessary for short reports.

Summary. The purpose of the summary is to allow busy people to get the gist of the report, without having to read it all. It should be an “independent” statement of the content of the report, including:

a) a brief statement of the purpose and scope of the report;
b) a brief outline of what has been done and how it was done;
c) the findings;
d) the conclusions;
e) and the recommendations.

It should contain only the essential information which the reader will need.

It should be written after completion of the rest of the report. Summary may precede or begin reports. If these summaries precede, the reports may begin in any way that the writers think will meet the needs of their readers.

The main part of the report

Introduction. The introduction leads the reader into report and sets the scene. It may include:

a) your terms of reference - the mandate you were given when you were commissioned to write the report;
b) the name of the person who commissioned the report;
c) the reason for writing the report or conducting the investigation;
d) the scope (and limitations) of the report;
e) the method of enquiry used.

Although the introduction appears at the beginning of the report, you will usually write it after the body of the report, when you will know better what is needed. So, write your introduction last.

The body of the report. This section contains all the facts and your findings. The number of parts that will appear in the body will vary according to:

– subject matter;
– the type of investigation.

There are no rules on this! But you must give a logical and balanced presentation and you must give each section a heading. Popular report openings are statements of problem, of necessary background, of interest-catching information, or questions and answers.

Pattern reports - those with the material always arranged under the same headings, which are always in the same order - may be easy writing, but, as Sheridan noted, “Easy writing’s curst hard reading”. Some readers become impatient, some sleepy if they know just where every report is going section by section. When they are not always familiar with the plan of reports, they are more alert and attentive, anticipating the unexpected.

Conclusions. The purpose of the conclusion of a report is to draw together the main points of the report and present a considered judgement. But, you should not introduce any new material at this stage. Some major reports may have “mini” conclusions at the end of each section in the body of the report. These "mini" conclusions should all be brought together in the general conclusions here.

Recommendations. The recommendations should follow naturally from your conclusions.

Sometimes, the recommendations will be obvious and clear-cut, and you won't be able to offer any alternatives. However, there will be occasions when there will be several possibilities open and in these circumstances your recommendations must be based on clearly stated facts and sound arguments.

Your recommendations for action should be:

- within your terms of reference;
- fully considered (including the financial implications of the consequences);
- specific;
- well-defined;
- sound-practical and possible.

Recommendations are your advice as to the best choice or course of action, which follows logically from your conclusions,

e.g. *"Therefore, I recommend that six new posts be created to deal with the increased workload".*

Sometimes report writers give their writing what's called "pseudo-objectivity" by using phrases like:

It is recommended that...
It is considered that...
It has been established that...

This form of expression is called "pseudo-objectivity" because the writer has avoided saying "I" or "We" which sounds like a subjective judgement. If the writer "recommends", or is "proposing", or "believes" then this should be made clear. If more than one person has prepared the report, then "I" becomes "We".

If someone else "recommends" or "proposes" then, likewise this should be stated:

"The accounts department recommends that..."

Take care to ensure that the tone of your recommendations doesn't sound threatening to the reader. Don't use words which indicate an obligation to your reader, like "should", "ought", or "need".

<u>**Note**</u>: The main purpose of our model report is to INFLUENCE (from the Five I's). Because no decision is required from the reader, no recommendations are necessary in this report.

Supplementary material

Appendices. Appendices are the place for material which supports the body of the report, but is too detailed to be included there. Material which should be included in an appendix is that which the reader does not need to study in order to understand the report, but which she/he may turn to if she/he wishes to examine in detail the supporting evidence.

Give appendices a reference by which they are identified in the body of the report. Here is an example:

The first appendix may be "Appendix A". The first page of this appendix will be numbered "A(i)", the secon page "A(ii)", the third page "A(iii)", etc.

If the material is needed to sustain the theme of the text, leave it in the body of the report; otherwise your reader will be continually turning back and forth between the report and the appendices.

Bibliography. A bibliorgaphy is a list of the books and other works you have consulted. It has two purposes:

a) to show what resources you have used to gather information;
b) to help the reader find suitable background reading matter on the subject of the report.

Publishers, universities, companies, and government bureaux may have their own rules for entries in bibliographies and references, and writers should follow those rules. If no such standards exist, writers usually follow one of several authorities: the instructions and style guides of the prestigious journals or the associations in the author's specialization.

Glossary. It is sometimes impossible to avoid the use of technical jargon or terminology when you are writing a report. But, remember, if your reader isn't an expert in the subject, the terms can be unintelligible and frustrating. List all the terms in alphabetical order in a glossary, with an explanation of each. If there is only a small number of words which need explanation, you can use footnotes in the report instead of a glossary.

Indexes. Indexes may be provided for long, detailed reports. Arranged in alphabetical order, not like a table of contents, which is arranged in page order, an index contains more details than a table of contents. But they both refer readers only to the contents of a report.

Many reports don't need appendices, bibliographies, glossaries and indices. These are mainly used for lengthy reports on major topics.

Presentation

The presentation of your report - what it looks like - is almost as important as what it says. Don't let poor presentation reduce the impact of an otherwise good report.

Your aim in presenting a report should be to make it look inviting to the reader. Here are a few tips to help you achieve an attractive and therefore inviting appearance.

Typing

Most typing is produced single-spaced. However, it is not the best way to type a report. If it is typed in single space type without headings, it will appear to the reader as a great mass of type and reading will be a daunting task.

Have your report typed in one and a half space type and use headings to break up the mass and act as "signposts" to help your reader find his/her way about your report.

Headings

You should need more than four levels of headings in your report:

- Chapter;
- Section;
- Major Topic;
- Minor Topic.

You can use the following to show the relative importance of sections of the text:
Numbering
Indenting
Using upper and lower case
Underlining or bold face
In larger reports you can use all four at once.

Paragraphs

There are some basic “rules” to remember about paragraphs:

- use one paragraph for each point. Start the paragraph with the main point and follow on with any qualifications or examples;
- try to keep paragraphs to a maximum of 10 lines. Solid blocks of text will put your reader off;
- avoid using a series of one line paragraphs. Instead use bullet points.

Lecture 8 JOB DESCRIPTIONS

1. *Writing Job Descriptions*
2. *Job Description Template*
3. *Person-profile template:*
4. *Tips On Creating, Introducing And Agreeing Job Descriptions*
5. *Directors Responsibilities, Corporate Responsibility And Job Descriptions*
6. *Summary Guidelines*

1. Writing Job Descriptions

Job descriptions are usually essential for managing people in organizations. Job descriptions are required for recruitment so that you and the applicants can understand the job role. Job descriptions are necessary for most people in work. A job description defines a person's role and accountability. Without a job description it is usually very difficult for a person to properly commit to, or be held accountable for, a role. This is especially so in large organizations.

As an employee you may have or be given the opportunity to take responsibility for your job description. This is good. It allows you to clarify expectations with your employer and your boss.

The process of writing job descriptions is actually quite easy and straight-forward. Many people tend to start off with a list of 20-30 tasks, which is okay as a start, but this needs refining to far fewer points, around 8-12 is the ideal.

Smaller organisations commonly require staff and managers to cover a wider or more mixed range of responsibilities than in larger organisations (for example, the 'office manager' role can comprise financial, HR, stock-control, scheduling and other duties). Therefore in smaller organisations, job descriptions might necessarily contain a greater number of listed responsibilities, perhaps 15-16. However, whatever the circumstances, the number of responsibilities should not exceed this, or the job description becomes unwieldy and ineffective.

Any job description containing 20-30 tasks is actually more like a part of an operational manual, which serves a different purpose. Job descriptions should refer to the operational manual, or to 'agreed procedures', rather than include the detail of the tasks in the job description. If you include task detail in a job description you will need to change it when the task detail changes, as it will often do. What would you rather change, 100 job descriptions or one operational manual?

Similarly, lengthy details of health and safety procedures should not be included in a a job description. Instead put them into a health and safety manual, and then simply refer to this in the job description. Again, when your health and safety procedure changes, would you rather change 100 job descriptions or just one health and safety manual?

A useful process for refining and writing job descriptions responsibilities into fewer points and ('responsibilities' rather than 'individual tasks'), is to group the many individual tasks into main responsibility areas, such as the list below (not all will be applicable to any single role). Bold type indicates that these responsibility areas would normally feature in most job descriptions:

Bold type indicates that these responsibility areas would normally feature in most job descriptions:

- communicating (in relation to whom, what, how - and this is applicable to all below)
- planning and organizing (of what..)
- managing information or general administration support (of what..)
- monitoring and reporting (of what..)
- evaluating and decision-making (of what..)
- financial budgeting and control (of what..)
- producing things (what..)
- maintaining/repairing things (what..)
- quality control (for production roles normally a separate responsibility; otherwise this is generally incorporated within other relevant responsibilities) (of what..)
- health and safety (normally the same point for all job descriptions of a given staff grade)
- using equipment and systems (what..)
- creating and developing things (what..)
- self-development (normally the same point for all job descriptions of a given staff grade) plus any responsibilities for other staff if applicable, typically:
- recruiting (of direct-reporting staff)
- assessing (direct-reporting staff)
- training (direct-reporting staff)

- managing (direct-reporting staff)

Senior roles will include more executive aspects:

- developing policy
- duty of care and corporate responsibility
- formulation of direction and strategy

You will find that you can cluster most of the tasks on your (initially very long) list into a list of far fewer broad (but still specific) responsibilities according to the above examples of typical job description activity areas.

Obviously the level of authority affects the extent of responsibility in the job description for determining strategy, decision-making, managing other people, and for executive roles, deciding direction, policy, and delivering corporate performance.

Wherever possible refer the detail of standards and process to your 'operational manual' or 'agreed procedures' or 'agreed standards' rather than allowing the job description to become a sort of operating manual. If your boss or employer is asking for you to detail your tasks at length in a job description, encourage him/her/the organisation to put this level of detail into an operational manual - it will save a lot of time.

Writing or re-writing a job description is a good opportunity to frame the role as you'd like it as well as reflect how it is at the moment, so try to think outside of the normal way of thinking, and if this is difficult seek the input of somebody who is less close to things.

Job descriptions improve an organisation's ability to manage people and roles in the following ways:

- clarifies employer expectations for employee
- provides basis of measuring job performance
- provides clear description of role for job candidates
- provides a structure and discipline for company to understand and structure all jobs and ensure necessary activities, duties and responsibilities are covered by one job or another
- provides continuity of role parameters irrespective of manager interpretation
- enables pay and grading systems to be structured fairly and logically
- prevents arbitrary interpretation of role content and limit by employee and employer and manager
- essential reference tool in issues of employee/employer dispute
- essential reference tool for discipline issues
- provides important reference points for training and development areas
- provides neutral and objective (as opposed to subjective or arbitrary) reference points for appraisals, performance reviews and counselling
- enables formulation of skill set and behaviour set requirements per role
- enables organisation to structure and manage roles in a uniform way, thus increasing efficiency and effectiveness of recruitment, training and development, organisational structure, work flow and activities, customer service, etc
- enables factual view (as opposed to instinctual) to be taken by employees and managers in career progression and succession planning

(The list is not exhaustive.)

Here you'll find job descriptions structure and template, and samples of various job descriptions. Also template and sample 'person-profile', necessary when recruiting.

Be very careful to adhere to relevant employment an discrimination law when compiling job descriptions, job adverts and person-profiles. In the UK this means that you must not specify a preference according to gender, race, creed, religion, or physical ability. If you find yourself writing a job description with a bias in any of these areas you should ask yourself why, as none can be justified.

In the UK company directors have personal liability for the activities of their organizations aside from their functional responsibilities, and arguably this accountability should be included in some way in a director's job description. Clarity is vital. People and employers need to have a clear, mutual agreement about the expectations for the job, and the job description is a key instrument by which this is achieved.

That said, job descriptions are not operating manuals. I repeat, keep the descriptions of duties concise and free of detailed operating or processing instructions. If necessary refer to these is a phrase such as 'according to company procedures', or 'according to the operating manual/safety manual', etc. By referencing rather than including specific operating standards or processes, the headache of updating all the job descriptions when procedures change is avoided.

2. Job Description Template

- Job Title
- Based at (Business Unit, Section - if applicable)
- Position reports to (Line Manager title, location, and Functional Manager, location if matrix management structure)
- Job Purpose Summary (ideally one sentence)
- Key Responsibilities and Accountabilities, (or 'Duties'. 8-15 numbered points)
- Dimensions/Territory/Scope/Scale indicators (the areas to which responsibilities extend and the scale of responsibilities - staff, customers, territory, products, equipment, premises, etc)
- Date and other relevant internal references

For senior job descriptions it is useful to break key responsibilities into sections covering Functional, Managerial, and Organisational areas.

The most difficult part is the Key Responsibilities and Accountabilities section. Large organisations have generic versions for the most common organisational roles - so don't re-invent the wheel if something suitable already exists. If you have to create a job description from scratch, use this method to produce the 8-15 responsibilities:

1. Note down in a completely random fashion all of the aspects of the job.
2. Think about: processes, planning, executing, monitoring, reporting, communicating, managing people/resources/activities/money/information/inputs/outputs/communications/time.
3. Next combine and develop the random collection of ideas into a set of key responsibilities. (A junior position will not need more than 8. A senior one might need 15.)
4. Rank them roughly in order of importance.

5. Have someone who knows or has done the job well check your list and amend as appropriate.

6. Double check that everything on the list is genuinely important and achievable.

Do not put targets into a job description. Targets are a moving output over which you need flexible control.

Do not put 'must achieve sales target' into a job description. This is a pure output and does not describe the job. The job description must describe the activities required to ensure that target will be met.

Do not have as one of the key responsibilities 'And anything else that the manager wants'. It's not fair, and no-one is ever committed to or accountable for such a thing.

Job description example 1:

Job Description - SNP Co Ltd

Title: Sales and Marketing Executive

Reports to: Sales and Marketing Director, Newtown.

Based at: Sparkly New Products Co Ltd, Technology House, Newtown.

Job purpose:

To plan and carry out direct marketing and sales activities, so as to maintain and develop sales of SNP's ABC machinery range to UK major accounts and specifiers, in accordance with agreed business plans.

Key responsibilities and accountabilities:

1. Maintain and develop a computerised customer and prospect database.
2. Plan and carry out direct marketing activities (principally direct mail) to agreed budgets, sales volumes, values, product mix and timescales.
3. Develop ideas and create offers for direct mail and marketing to major accounts by main market sector and SNP's ABC products.
4. Respond to and follow up sales enquiries by post, telephone, and personal visits.
5. Maintain and develop existing and new customers through planned individual account support, and liaison with internal order-processing staff.
6. Monitor and report on activities and provide relevant management information.
7. Carry out market research, competitor and customer surveys.
8. Maintain and report on equipment and software suitability for direct marketing and sales reporting purposes.
9. Liaise and attend meetings with other company functions necessary to perform duties and aid business and organisational development.
10. Manage the external marketing agency activities of telemarketing and research.
11. Attend training and to develop relevant knowledge and skills.

Scale and territory indicators:

Core product range of four ABC machines price range £50 to £250. Target sectors: All major multiple-site organisations having more than 1,000 staff. Prospect database c.10,000 head offices of large organisations. Customer base of c.150 large organisations. Typical account value £20-50k pa. Total personal revenue accountability potentially £4.5m. Territory: UK.

(date and reference)

More job description typical responsibilities are listed at the foot of this page.

If you are recruiting to fill a role it is important to formulate a person-profile to help with job advert wording; psychometric profiling; shortlisting; interviewing points to assess; and final selection.

3. Person-profile template:

- Personality
- Personal Situation
- Specific Job Skills
- Computer Skills
- Literacy and Numeracy
- Commercial Skills
- Management Ability

An example is shown here for the role above:

Sample person-profile

Person profile - Sales and Marketing Executive

Personality: Self-driven, results-oriented with a positive outlook, and a clear focus on high quality and business profit. A natural forward planner who critically assesses own performance. Mature, credible, and comfortable in dealing with senior big company executives. Reliable, tolerant, and determined. Empathic communicator, able to see things from the other person's point of view. Well presented and businesslike. Sufficiently mobile and flexible to travel up to a few days a month within the UK. Keen for new experience, responsibility and accountability. Able to get on with others and be a team-player.

Personal Situation: Must be mature and domestically secure. Able to spend one or two nights away per month without upsetting domestic situation. Able to commute reliably to office base. Able to work extended hours on occasions when required. May be striving financially but not desperate or in serious debt. Must have clean or near clean driving licence.

Specific Job Skills: Able to communicate and motivate via written media. Understands the principles of marketing and advertising cost-effectiveness, including market sector targeting, product offer development, features-benefits-solutions selling, cost per response, cost per conversion, etc. Appreciates need for consistency within company's branding and marketing mix, especially PR and the Internet. Experience of managing marketing agency activities useful.

Computer skills: Must be adept in use of MS Office 2000 or later, particularly Excel and Word, and ideally Access or similar database to basic level, Internet and email.

Literacy and Numeracy: Able to understand profit and loss calculations and basic business finance, e.g., gross margin percentages and calculations, depreciation, capital and revenue expenditure, cash-flow, overheads, etc. Must be a very competent writer of business letters, quotations and proposals.

Business and Selling Skills: Must be an excellent face-to-face and telephone communicator. Able to demonstrate success and experience managing major accounts customers and large contracts or even a business, particularly achieving genuine sales development. Ideal background would be in business support services; experience of washroom and contract cleaning industries would be particularly helpful. Experience of tenders would also be useful.

Management Ability: Though internal staff management is not initially part of the job, responsibility and opportunity could grow with the development of the business, for example the prospect of recruiting and managing support telesales staff. Some people-management skills, experience and natural ability will be useful.

4.Tips On Creating, Introducing And Agreeing Job Descriptions

There are several ways to approach the need for new or updated job descriptions within an organization or department, and these methods can achieve some other useful benefits too. The workshop method is particularly effective and time-saving.

Workshop (see the sections on workshops an brainstorming) - people brainstorm and draft job descriptions in pairs or threes - ideas are shared, best formats agreed and senior management is able to participate, guide and approve. This process for creating or revising job descriptions is also very good for creating a sense of ownership of responsibilities and accountabilities, and for clarifying mutual understanding and expectations.

Cascade a basic empty template down through staff, asking for each staff member to draft what they believe is there own JD, and for each person to provisionally agree/modify JD with their line boss. These drafts then come back up to centre for review, adjustment and re-issue. Also promotes useful discussion and clarification of expectations between staff members and their line-managers.

Draft provisional generic formats at centre - then cascade through staff via line managers for comment/agreement, between staff members and line managers.

General points on creating or updating job descriptions:

Where you have a number of similar job functions, try to limit the main job description types to as few as possible. Reflect job differences in levels of authority, seniority and scale etc, in the parameters section of the main job description.

Encourage line managers to hold their own workshop meetings to arrive at shared best ideas and consensus.

Your trade association(s) might be able to assist with some generic job description samples. It's also worth asking large partners/customer organisations if they can show you their equivalent job descriptions, where they have similar jobs.

5. Directors Responsibilities, Corporate Responsibility And Job Descriptions

Arguably there are some special aspects of a company director's role which should be reflected in job descriptions aside from normal functional duties or job tasks. This is not least because board directors are personally liable for corporate activities, and so issues of ethics, morality, legality, safety, duty of care, etc., are the responsibility of all directors, in addition to their normal functional responsibilities.

How you incorporate these aspects into directors' job descriptions (and logically into directors' appraisals too) is a matter of interpretation and policy. A catch-all phrase is an option, for example: 'Execute the responsibilities of a company director according to lawful and ethical standards, as referenced in ... (whatever director policy and standards document you might use).

And/or with growing significance, for example: 'Uphold, safeguard and promote the organisation's values and philosophy relating particularly to ethics, integrity, corporate (social) responsibility, 'Fair Trade', etc., as referenced in ... (whatever organisational values and philosophy standards document you might use).

However, in this modern age there is an increasing need for organisations to be more specific about what all this means for directors.

Most if not all of the great corporate scandals of recent times can be attributed one way or another to directors neglecting or being unaware of their responsibilities for some of less obvious but crucial areas of ethics, integrity, morality and organisational responsibility. When such responsibilities are spelled out clearly, and the assessment of directors' performance against them made properly transparent, then organisations are far less open to risks of corporate scandal, fraud, and other disasters.

In addition, employees and customers are growing increasingly aware and demanding of corporations' performance in these non-financial 'humanity and planet' areas, and the increasing visibility of corporate culture and behaviour, through the development of modern communications and phenomena such as blogging, grows each year.

There are few corporate secrets any longer - nearly everyone has access to nearly everything. Soon there'll be no corporate secrets at all. It makes sense therefore for all organisations to assess and improve their own standing in relation to corporate responsibility, before the world at large does it for them.

Directors' responsibilities, their relative importance and how they are shaped, in the 'non-functional' areas (ethics, environment, people, planet, community, etc) naturally reflect the corporate philosophy of the organisation concerned, and this is the mechanism by which change and improvement can be made. In other words, the organisation needs to have a clearly stated position (from which stems the culture and 'spirit' - the philosophy - of the corporation) that clearly explains the relative priority within organisational aims of responsibility to staff, customers, shareholders, community, environment, etc., and also the significance of morality and ethics within the organisational ethos. These critical non-functional 'humanity and planet' responsibilities stem from the philosophy at the top of the organisation, not the PR department.

Corporate Responsibility (or whatever description you care to use) is a challenging and fluid subject, surrounded by much debate, characterised by various converging perspectives, notably, the 'Triple Bottom Line' (Profit People Planet), ethics and integrity, CSR (Corporate Social Responsibility - increasingly shortened simply to Corporate Responsibility), sustainability, Fair Trade, etc.

Interpreting all this and creating a workable platform for it all within an organisation is the responsibility of the CEO (or equivalent). In an institutional not-for-profit organisation the trustees or governors would ultimately carry the can for any serious failures. In a club it would be the committee members. The buck always stops somewhere, and if it's with you then check that your responsibilities and remit adequately reflect your accountability.

In conventional profit driven corporations the accountability rests with the directors, which is why directors' job descriptions need to spell out these responsibilities - to whatever extent the organisation (the CEO typically) deems appropriate.

Middle managers trying to make sense of of it all and wondering how to apply it to their strategic planning and decision-making will find it tricky to fill a vacuum in this area one exists, which is often the case.

The default 'corporate philosophy' is usually profit alone, with no genuine reference to humanitarian and planetary issues, which is ultimately a recipe for disaster. The bigger the corporation and its potential liabilities, then the greater the disaster when and if it occurs. Chemicals, healthcare, transport, automotive, pharmaceuticals, financial services, food and drink, consumer technology, and tobacco products are obvious examples of high-liability industries, each of which has produced at a number of massive corporate debacles in recent years, and these won't be the last.

Directors, (and thereby managers and all other staff) need a wider and more subtle frame of reference than profit alone, to enable and encourage them to plan, direct, manage and act in a more inclusive and philosophically acceptable way than simply being focused on profit or costs.

Shareholder return (or financial performance) is vital of course, but it must never be the sole aim.

As regards the more straightforward issues (safety, legal etc), in the UK various bodies can help in determining the traditional director's responsibilities. The Institute of Directors produce specific guidelines on responsibilities of directors (www.iod.com). Other possible sources of input from different perspectives: ACAS - Advisory, Conciliation and Arbitration Service (www.acas.co.uk), Government departments/agencies and their websites (e.g., www.gov.uk). I mention these because they provide a certain level of advice free. If you are new to the HR or personnel role, check whether your organisation (or for example your parent company) has corporate membership to IOD, CIPD, etc., or retains the services of a specialist employment advisory consultancy. You'll need help in interpreting a suitable response to these new challenges, both in persuading senior people that these are significant issues, not just a PR thing or passing trend, and also in formulating a practicable and relevant approach to it all.

As regards corporate responsibility in a truer wider sense (people, planet, ethics, etc), standards and terms of reference are still fluid - it's difficult to measure the benefit of these things, therefore they are taking a long time being accepted and adopted (like the abolition of slavery, votes for women, etc). But that doesn't mean you cannot take the lead and formulate your own standards. Organisations which seek to pioneer ethical and humanitarian standards and practices will increasingly be the suppliers and employers of choice for all right-minded people.

Organisations which fail to address these vital questions of ethics, humanity, social and environmental responsibility, etc., and which fail to reflect these accountabilities within director's (and thereby all other employees') responsibilities, are taking some big risks, whereas the organisations which embrace and adopt these 'higher-order' values will almost inevitably create for themselves a more sustainable future.

6. Summary Guidelines

A good job description must be a brief concise document - not lots of detail of how each individual task is done, which should be in an operational manual, which can of course then be referenced by very many different job descriptions, saving lots of time, especially when operational details change, as they inevitably do.

A job description is in essence a list of 8-15 short sentences or points which cover the main responsibilities of the role, not the detailed processes.

Follow the job description structure and guidelines on this webpage - don't get side-tracked or persuaded into writing an operational manual. Detailed tasks belong in an operational manual, not a job description. If your boss or organisation thinks your job description should contain the detail of how you do your job, then encourage him/her/your organisation to produce an operational manual instead, and explain the logic and time-saving benefits that are shown on this page.

Use the job description structure on this webpage as a template into which you should put your main 8-15 responsibilities.

If you need to re-write job descriptions (or your own job description) then structure it in terms of main responsibilities - not the detail. If you wish, or if helpful to arrive at your main responsibilities, you can list the detail of your job tasks elsewhere, as this effectively represents a section in an operations manual - which shows the detail of how the job is done. You can use use the detail to indicate (to yourself) the main responsibilities, but for the job description you must summarise the detail into broad descriptions, for example:

All the detail concerned with, for instance 'invoicing', could be covered by: 'manage and report on all invoicing activities using agreed systems and processes (as defined in the operational manual).'

All the detailed process concerned with, say 'cash management', could be included in 'manage movement, security and accounting of cash in accordance with agreed processes and standards (as defined in the operating manual).'

See what I mean? Try to identify the main activities by type, not the detail.

Where appropriate refer to where the detail is held (for example the operational manual, safety manual, or say 'agreed procedures/standards') - do not attempt to include the detail in the job description.

It might help to see things in terms of the main types of activities (rather than your specific task detail), as listed at the top of the webpage and listed here again:

Bold type indicates that these responsibility areas would normally feature in most job descriptions:

- communicating (in relation to whom, what, how - and this is applicable to all below)

- planning and organizing (of what..)
- managing information or general administration support (of what..)
- monitoring and reporting (of what..)
- evaluating and decision-making (of what..)
- financial budgeting and control (of what..)
- producing things (what..)
- maintaining/repairing things (what..)
- quality control (for production roles normally a separate responsibility; otherwise this is generally incorporated within other relevant responsibilities) (of what..)
- health and safety (normally the same point for all job descriptions of a given staff grade)
- using equipment and systems (what..)
- creating and developing things (what..)
- self-development (normally the same point for all job descriptions of a given staff grade) plus any responsibilities for other staff if applicable, typically:
- recruiting (of direct-reporting staff)
- assessing (direct-reporting staff)
- training (direct-reporting staff)
- managing (direct-reporting staff)

Senior roles will include more executive aspects:

- developing policy
- duty of care and corporate responsibility
- formulation of direction and strategy

You will find that you can cluster most of the tasks on your (initially very long) list into a list of far fewer broad (but still specific) responsibilities according to the above examples of typical job description activity areas.

The tendency when having to create or re-write job descriptions is to under-estimate the strategic nature of the role and responsibilities, and to be too detailed.

If writing your own job description, especially if you perform a wide range of responsibilities in a small company, then try to be bold in the way you describe what you do - use the sort of terminology that is found in senior-level job descriptions - it is likely that you could have a similar type of strategic responsibility without realising it or being recognised for it.

Doing this will help you and others to recognise, formalise and acknowledge the importance of what you do, and therefore your value to the organisation. It will also suggest several ways in which you could grow and to develop (into) the functions involved, and also indicate ways that the responsibilities activities can be developed, whether you do them or not, although you may be surprised at the high level of your own influence to drive and decide these decisions. Empowerment is often what you make it.

Lecture 9 TYPES OF INTERVIEWS

1. *The Screening Interview*
2. *The Informational Interview*
3. *The Directive Style*
4. *The Meandering Style*
5. *The Stress Interview*
6. *The Behavioral Interview*
7. *The Audition*
8. *The Group Interview*
9. *The Tag-Team Interview*
10. *The Mealtime Interview*
11. *The Follow-up Interview*

All job interviews have the same objective, but employers reach that objective in a variety of ways. You might enter the room expecting to tell stories about your professional successes and instead find yourself selling the interviewer a bridge or editing code at a computer. One strategy for performing your best during an interview is to know the rules of the particular game you are playing when you walk through the door.

1. The Screening Interview

Companies use screening tools to ensure that candidates meet minimum qualification requirements. Computer programs are among the tools used to weed out unqualified candidates. (This is why you need a digital resume that is screening-friendly. See our resume center for help.) Sometimes human professionals are the gatekeepers. Screening interviewers often have honed skills to determine whether there is anything that might disqualify you for the position. Remember-they do not need to know whether you are the best fit for the position, only whether you are not a match. For this reason, screeners tend to dig for dirt. Screeners will hone in on gaps in your employment history or pieces of information that look inconsistent. They also will want to know from the outset whether you will be too expensive for the company.

Some tips for maintaining confidence during screening interviews:

- Highlight your accomplishments and qualifications.
- Get into the straightforward groove. Personality is not as important to the screener as verifying your qualifications. Answer questions directly and succinctly. Save your winning personality for the person making hiring decisions!
- Be tactful about addressing income requirements. Give a range, and try to avoid giving specifics by replying, "I would be willing to consider your best offer."
- If the interview is conducted by phone, it is helpful to have note cards with your vital information sitting next to the phone. That way, whether the interviewer catches you sleeping or vacuuming the floor, you will be able to switch gears quickly.

2. The Informational Interview

On the opposite end of the stress spectrum from screening interviews is the informational interview. A meeting that you initiate, the informational interview is underutilized by job-seekers who might otherwise consider themselves savvy to the merits of networking. Job seekers ostensibly secure informational meetings in order to seek the advice of someone in their current or desired field as well as to gain further references to people who can lend insight. Employers that like to stay apprised of available talent even when they do not have current job openings, are often open to informational interviews, especially if they like to share their knowledge, feel flattered by your interest, or esteem the mutual friend that connected you to them. During an informational interview, the jobseeker and employer exchange information and get to know one another better without reference to a specific job opening.

This takes off some of the performance pressure, but be intentional nonetheless:

- Come prepared with thoughtful questions about the field and the company.
- Gain references to other people and make sure that the interviewer would be comfortable if you contact other people and use his or her name.
- Give the interviewer your card, contact information and resume.
- Write a thank you note to the interviewer.

3. The Directive Style

In this style of interview, the interviewer has a clear agenda that he or she follows unflinchingly. Sometimes companies use this rigid format to ensure parity between interviews; when interviewers ask each candidate the same series of questions, they can more readily compare the results. Directive interviewers rely upon their own questions and methods to tease from you what they wish to know. You might feel like you are being steam-rolled, or you might find the conversation develops naturally. Their style does not necessarily mean that they have dominance issues, although you should keep an eye open for these if the interviewer would be your supervisor.

Either way, remember:

- Flex with the interviewer, following his or her lead.
- Do not relinquish complete control of the interview. If the interviewer does not ask you for information that you think is important to proving your superiority as a candidate, politely interject it.

4. The Meandering Style

This interview type, usually used by inexperienced interviewers, relies on you to lead the discussion. It might begin with a statement like "tell me about yourself," which you can use to your advantage. The interviewer might ask you another broad, open-ended question before falling into silence. This interview style allows you tactfully to guide the discussion in a way that best serves you.

The following strategies, which are helpful for any interview, are particularly important when interviewers use a non-directive approach:

- Come to the interview prepared with highlights and anecdotes of your skills, qualities and experiences. Do not rely on the interviewer to spark your memory-jot down some notes that you can reference throughout the interview.
- Remain alert to the interviewer. Even if you feel like you can take the driver's seat and go in any direction you wish, remain respectful of the interviewer's role. If he or she becomes more directive during the interview, adjust.
- Ask well-placed questions. Although the open format allows you significantly to shape the interview, running with your own agenda and dominating the conversation means that you run the risk of missing important information about the company and its needs.

5. The Stress Interview

Astounding as this is, the Greek hazing system has made its way into professional interviews. Either employers view the stress interview as a legitimate way of determining candidates' aptness for a position or someone has latent maniacal tendencies. You might be held in the waiting room for an hour before the interviewer greets you. You might face long silences or cold stares. The interviewer might openly challenge your believes or judgment. You might be called upon to perform an impossible task on the fly-like convincing the interviewer to exchange shoes with you. Insults and miscommunication are common. All this is designed to see whether you have the mettle to withstand the company culture, the clients or other potential stress.

Besides wearing a strong anti-perspirant, you will do well to:

- Remember that this is a game. It is not personal. View it as the surreal interaction that it is.
- Prepare and memorize your main message before walking through the door. If you are flustered, you will better maintain clarity of mind if you do not have to wing your responses.
- Even if the interviewer is rude, remain calm and tactful.
- Go into the interview relaxed and rested. If you go into it feeling stressed, you will have a more difficult time keeping a cool perspective.

6. The Behavioral Interview

Many companies increasingly rely on behavior interviews since they use your previous behavior to indicate your future performance. In these interviews, employers use standardized methods to mine information relevant to your competency in a particular area or position. Depending upon the responsibilities of the job and the working environment, you might be asked to describe a time that required problem-solving skills, adaptability, leadership, conflict resolution, multi-tasking, initiative or stress management. You will be asked how you dealt with the situations.

Your responses require not only reflection, but also organization. To maximize your responses in the behavioral format:

- Anticipate the transferable skills and personal qualities that are required for the job.
- Review your resume. Any of the qualities and skills you have included in your resume are fair game for an interviewer to press.

- Reflect on your own professional, volunteer, educational and personal experience to develop brief stories that highlight these skills and qualities in you. You should have a story for each of the competencies on your resume as well as those you anticipate the job requires.
- Prepare stories by identifying the context, logically highlighting your actions in the situation, and identifying the results of your actions. Keep your responses concise and present them in less than two minutes.

Figure 9.1 lists common behavioral interview questions.

Figure 9.1 Behavioral interview questions.

- Describe a situation in which you
- 1. Created an opportunity for yourself in a job or volunteer position.
- 2. Used writing to achieve your goal.
- 3. Went beyond the call of duty to get a job done.
- 4. Communicated successfully with someone you disliked.
- 5. Had to make a decision quickly.
- 6. Overcame a major obstacle.
- 7. Took a project from start to finish.
- 8. Were unable to complete a project on time.
- 9. Used good judgment and logic in solving a problem.
- 10. Worked under a tight deadline.
- 11. Worked with a tough boss.
- 12. Handled a difficult situation with a co-worker.
- 13. Made an unpopular decision.
- 14. Gave a presentation.
- 15. Worked with someone who wasn't doing his or her share of the work.

7. The Audition

For some positions, such as computer programmers or trainers, companies want to see you in action before they make their decision. For this reason, they might take you through a simulation or brief exercise in order to evaluate your skills. An audition can be enormously useful to you as well, since it allows you to demonstrate your abilities in interactive ways that are likely familiar to you. The simulations and exercises should also give you a simplified sense of what the job would be like. If you sense that other candidates have an edge on you in terms of experience or other qualifications, requesting an audition can help level the playing field.

To maximize on auditions, remember to:

- Clearly understand the instructions and expectations for the exercise. Communication is half the battle in real life, and you should demonstrate to the prospective employer that you make the effort to do things right the first time by minimizing confusion.
- Treat the situation as if you are a professional with responsibility for the task laid before you. Take ownership of your work.
- Brush up on your skills before an interview if you think they might be tested.

8. The Group Interview

Interviewing simultaneously with other candidates can be disconcerting, but it provides the company with a sense of your leadership potential and style. The group interview helps the company get a glimpse of how you interact with peers-are you timid or bossy, are you attentive or do you seek attention, do others turn to you instinctively, or do you compete for authority? The interviewer also wants to view what your tools of persuasion are: do you use argumentation and careful reasoning to gain support or do you divide and conquer? The interviewer might call on you to discuss an issue with the other candidates, solve a problem collectively, or discuss your peculiar qualifications in front of the other candidates.

This environment might seem overwhelming or hard to control, but there are a few tips that will help you navigate the group interview successfully:

- Observe to determine the dynamics the interviewer establishes and try to discern the rules of the game. If you are unsure of what is expected from you, ask for clarification from the interviewer.
- Treat others with respect while exerting influence over others.
- Avoid overt power conflicts, which will make you look uncooperative and immature.
- Keep an eye on the interviewer throughout the process so that you do not miss important cues.

9. The Tag-Team Interview

Expecting to meet with Ms. Glenn, you might find yourself in a room with four other people: Ms. Glenn, two of her staff, and the Sales Director. Companies often want to gain the insights of various people when interviewing candidates. This method of interviewing is often attractive for companies that rely heavily on team cooperation. Not only does the company want to know whether your skills balance that of the company, but also whether you can get along with the other workers. In some companies, multiple people will interview you simultaneously. In other companies, you will proceed through a series of one-on-one interviews.

Some helpful tips for maximizing on this interview format:

- Treat each person as an important individual. Gain each person's business card at the beginning of the meeting, if possible, and refer to each person by name. If there are several people in the room at once, you might wish to scribble down their names on a sheet of paper according to where each is sitting. Make eye contact with each person and speak directly to the person asking each question.
- Use the opportunity to gain as much information about the company as you can. Just as each interviewer has a different function in the company, they each have a unique perspective. When asking questions, be sensitive not to place anyone in a position that invites him to compromise confidentiality or loyalty.

- Bring at least double the anecdotes and sound-bites to the interview as you would for a traditional one-on-one interview. Be ready to illustrate your main message in a variety of ways to a variety of people.
- Prepare psychologically to expend more energy and be more alert than you would in a one-on-one interview. Stay focused and adjustable.

10. The Mealtime Interview

For many, interviewing over a meal sounds like a professional and digestive catastrophe in the making. If you have difficulty chewing gum while walking, this could be a challenge. With some preparation and psychological readjustment, you can enjoy the process. Meals often have a cementing social effect-breaking bread together tends to facilitate deals, marriages, friendships, and religious communion. Mealtime interviews rely on this logic, and expand it.

Particularly when your job requires interpersonal acuity, companies want to know what you are like in a social setting. Are you relaxed and charming or awkward and evasive? Companies want to observe not only how you handle a fork, but also how you treat your host, any other guests, and the serving staff.

Some basic social tips help ease the complexity of mixing food with business:

- Take cues from your interviewer, remembering that you are the guest. Do not sit down until your host does. Order something slightly less extravagant than your interviewer. If he badly wants you to try a particular dish, oblige him. If he recommends an appetizer to you, he likely intends to order one himself. Do not begin eating until he does. If he orders coffee and dessert, do not leave him eating alone.
- If your interviewer wants to talk business, do so. If she and the other guests discuss their upcoming travel plans or their families, do not launch into business.
- Try to set aside dietary restrictions and preferences. Remember, the interviewer is your host. It is rude to be finicky unless you absolutely must. If you must, be as tactful as you can. Avoid phrases like: "I do not eat mammals," or "Shrimp makes my eyes swell and water."
- Choose manageable food items, if possible. Avoid barbeque ribs and spaghetti.
- Find a discrete way to check your teeth after eating. Excuse yourself from the table for a moment.
- Practice eating and discussing something important simultaneously.
- Thank your interviewer for the meal.

11. The Follow-up Interview

Companies bring candidates back for second and sometimes third or fourth interviews for a number of reasons. Sometimes they just want to confirm that you are the amazing worker they first thought you to be. Sometimes they are having difficulty deciding between a short-list of candidates. Other times, the interviewer's supervisor or other decision makers in the company want to gain a sense of you before signing a hiring decision.

The second interview could go in a variety of directions, and you must prepare for each of them. When meeting with the same person again, you do not need to be as assertive in your communication of your skills. You can focus on cementing rapport, understanding where the company is going and how your skills mesh with the company vision and culture. Still, the interviewer should view you as the answer to their needs. You might find yourself negotiating a compensation package. Alternatively, you might find that you are starting from the beginning with a new person.

Some tips for managing second interviews:

- Be confident. Accentuate what you have to offer and your interest in the position.
- Probe tactfully to discover more information about the internal company dynamics and culture.
- Walk through the front door with a plan for negotiating a salary.
- Be prepared for anything: to relax with an employer or to address the company's qualms about you.

Lecture 10 BUSINESS MEETINGS

1. *Business Meetings*
2. *How to Plan a Meeting*
3. *Running meetings*

1. Business Meetings

Meeting an occasion when people gather to discuss things and make decisions, either inperson or using phones, the Internet etc

Companies use business meetings to review company information or establish new operating principles. Most meetings are directed by management, and time is spent helping employees understand the company financial health or operations.

Meetings come in all shapes and sizes. There are the everyday office meetings, board meetings, seminars -- all the way up to major conferences. And meetings can now be face-to-face, teleconference, videoconference, or online via the Internet. And when is the last time you heard someone say, "Gee, we need to have more meetings." There are more than enough meetings to go around these days, and for a good reason. Meetings are more important than ever. Modern workplaces are built on teams, sharing of ideas, and effective project coordination.

If communication is the lifeblood of any organization, then meetings are the heart and mind. The place where we communicate our ideas, hash them out, share our passion for better or worse, develop new understandings and new directions. It's where deals can happen or fall apart, where strategies are articulated and debated -- in short -- where we engage with others. That's what it's all about, people meeting with people.

Survey results published by the Annenberg School of Communications at UCLA and the University of Minnesota's Training & Development Research Center show that executives on average spend 40%-50% of their working hours in business meetings. Further evidence of the pervasiveness of meetings comes from a recent issue of Fast

Company magazine, where organizational psychologist Jon Ryburg says he advises corporate clients to provide twice as much meeting space as they did 20 years ago.

2. How to Plan a Meeting

Studies also point out a discouraging trend: Surveyed professionals agree that as much as 50% of that meeting time is unproductive and that up to 25% of meeting time is spent discussing irrelevant issues. Typically, they complain that meetings are too long, are scheduled without adequate time to prepare and end without any clear result.

Most of us have been to seminars or conferences where we've left feeling insipired and rejuvenated. But how many of us have ever left everyday meetings feeling the same way. Rarely, no doubt. The reason is that good seminars and conferences are organized precisely to engage us. Sadly, most office meetings are not.

Believe it or not, meetings can and should be the most interesting and productive part of your day. And if you've ever been to a great conference or seminar, you already have seen some of the basic principles at work. These can be summarized as:
1) preparation
2) facilitation
3) inspiration
4) results

Preparation means making sure your meeting has a clear, stated purpose, and an agenda. Participants are chosen carefully, invited in professional way and given sufficient prior information. Preparation also means attention to details including: room bookings, catering, a/v equipment, reminders.

Facilitation means that someone or a team is responsible for guiding the meeting, a plan for the meeting is reflected in the agenda and the facilitator (or chair) keeps things on time and on track.

Inspiration is probably the most overlooked aspect of everyday meetings. All the attention to detail and process can push the opportunity for spontaneity and enthusiasm aside. Build in activites that engage participants, use strategies to generate discussion, or visual aids to grab attention.

Results means that every meeting should be directed toward one or more outcomes. Participants must feel that something has been accomplished, and they must see all of their meetings as part of the bigger strategy to involve them in the future of the organization. Achievements at one meeting should be recapped in the next, and so on.

This site offers much more information and tools for running effective meetings, and you are encouraged to visit often for a little inspiration of your own. Initially developed due to popular request from users of our Meeting Wizard online meeting planning tool, MeetingWizard.org was developed to help make meetings the heart and mind of your organization.

Business meetings range from gatherings of small groups of people to large conferences with hundreds, or even thousands, in attendance. It is those mega meetings that many people find stressful. Here are pointers to help you make the most of business meetings and relieve some of the stress you may feel when you find you have to attend one.

Before You Go to a Business Meeting

- Meet Other Attendees in Advance: Get to know as many people as possible before you attend the conference.
- Look Your Best: When you look good, your confidence goes up. Make sure your hair and nails are well groomed.
- Dress Appropriately: Find out what type of attire is needed.
- Bring Clothes that Travel Well or bring an iron. You don't want your clothes to look rumpled.
- Pack Comfortable Shoes: You may be on your feet for long periods of time.

At the Business Meeting

- Introduce Yourself to Others: Making the first move may make you feel less vulnerable.
- Smile: Smiling (only when appropriate, of course) helps you look approachable.
- Psych Yourself Up: Remember the qualities others like about you.
- Get People to Talk About Themselves: Everyone likes to do this and it will take the focus off you.
- Beware of Alcohol: You don't want to become too uninhibited.

When the Business Meeting is Over

- Take Home Something Valuable: This could be an idea you may be able to implement or a new person to add to your network.
- Keep in Touch: Maintaining contact with those you met at the conference will make the next conference easier.

3. Running meetings

Here are the rules for running meetings. Meetings are vital for management and communication. Properly run meetings save time, increase motivation, productivity, and solve problems. Meetings create new ideas and initiatives. Meetings achieve buy-in. Meetings prevent 'not invented here' syndrome. Meetings diffuse conflict in a way that emails and memos cannot. Meetings are effective because the written word only carries 7% of the true meaning and feeling. Meetings are better than telephone conferences because only 38% of the meaning and feeling is carried in the way that things are said. The other 55% of the meaning and feeling is carried in facial expression and non-verbal signals. That's why meetings are so useful.

Hold meetings, even if it's difficult to justify the time. Plan, run and follow up meetings properly, and they will repay the cost many times over because there is still no substitute for physical face-to-face meetings. Hold meetings to manage teams and situations, and achieve your objectives quicker, easier, at less cost. Hold effective meetings to make people happier and more productive.

Brainstorming meetings are immensely powerful for team-building, creativity, decision-making and problem-solving .

Techniques of goal planning and project management are useful for running effective meetings.

Presentation skills and delegation abilities are helpful in meetings, and so is a basic understanding of motivation and personality.

Problem solving and decision-making are important in many meetings, although always consider how much of these responsibilities you can give to the group, which typically depends on their experience and the seriousness of the issue.

Meetings which involve people and encourage participation and responsibility are more constructive than meetings in which the leader tells, instructs and makes all the decisions, which is not a particularly productive style of leadership.

Holding meetings is an increasingly expensive activity, hence the need to run meetings well. Badly run meetings waste time, money, resources, and are worse than having no meetings at all.

The need to run effective meetings is more intense than ever in modern times, given ever-increasing pressures on people's time, and the fact that people are rarely now based in the same location, due to mobile working and progressively 'globalised' teams and organisational structures.

New technology provides several alternatives to the conventional face-to-face meeting around a table, for example phone and video-conferencing, increasingly mobile and web-based. These 'virtual meeting' methods save time and money, but given the advantages of physical face-to-face communications (see the Mehrabian theory) there will always be a trade-off between the efficiencies of 'virtual meetings' (phone and video-conferencing notably) and the imperfections of remote communications methods (notably the inability to convey body language effectively via video conferencing, and the inability to convey body language and facial expressions by phone communications).

Accordingly, choose meeting methods that are appropriate for the situation. Explore other options such as telephone conferencing and video conferencing before deciding that a physical meeting is required, and decide what sort of meeting is appropriate for the situation. Subject to obvious adaptations and restrictions, the main principles of running physical face-to-face meetings apply to running virtual meetings.

Physical face-to-face meetings are the most effective type of meetings for conveying feelings and meanings. Therefore it is not sensible or fair to hold a virtual (phone or video-conferencing) meeting about a very serious matter. Understand that meaning and feelings can be lost or confused when people are not physically sitting in the same room as each other. Trying to save time and money by holding virtual meetings for serious matters is often a false economy for the organisation, and can actually be very unfair to staff if the matter significantly affects their personal futures or well-being.

A meeting provides a special opportunity to achieve organisational outcomes, and also to help the attendees in a variety of ways, so approach all meetings keeping in mind these two different mutually supporting aims.

The aim and test of a well run meeting is that whatever the subject, people feel afterwards that it took care of their needs, as well as the items on the agenda.

Factors affecting how best to run meetings

Your choice of structure and style in running an effective meeting is hugely dependent on several factors:

- the situation (circumstances, mood, atmosphere, background, etc)

- the organisational context (the implications and needs of the business or project or organisation)
- the team, or the meeting delegates (the needs and interests of those attending)
- you yourself (your own role, confidence, experience, your personal aims, etc)
- your position and relationship with the team
- and of course the aims of the meeting.

There will always be more than one aim, because aside from the obvious reason(s) for the meeting, all meetings bring with them the need and opportunity to care for and/or to develop people, as individuals and/or as a team.

When you run a meeting you are making demands on people's time and attention. When you run meeting you have an authority to do so, which you must use wisely.

This applies also if the people at the meeting are not your direct reports, and even if they are not a part of your organisation.

Whatever the apparent reason for the meeting, you have a responsibility to manage the meeting so that it is a positive and helpful experience for all who attend.

Having this aim, alongside the specific meeting objective(s), will help you develop an ability and reputation for running effective meetings that people are happy to attend.

Meetings - basic rules

Here is a solid basic structure for most types of meetings. This assumes you have considered properly and decided that the meeting is necessary, and also that you have decided (via consultation with those affected if necessary or helpful) what sort of meeting to hold.

1. plan - use the agenda as a planning tool
2. circulate the meeting agenda in advance
3. run the meeting - keep control, agree outcomes, actions and responsibilities, take notes
4. write and circulate notes - especially actions and accountabilities
5. follow up agreed actions and responsibilities

Meetings come in all shapes and sizes, and for lots of purposes.

Meeting purposes include:

- giving information
- training
- discussion (leading to an objective)
- generating ideas
- planning
- workshops
- consulting and getting feedback
- finding solutions/solving problems
- crisis management
- performance reporting/assessment
- setting targets and objectives
- setting tasks and delegating
- making decisions

- conveying /clarifying policy issues
- team building
- motivating
- special subjects - guest speakers
- inter-departmental - process improvement

Meeting priorities

What is the meeting's purpose, or purposes? Always have a clear purpose; otherwise don't have a meeting. Decide the issues for inclusion in the meeting and their relative priority: importance and urgency - they are quite different and need treating in different ways. Important matters do not necessarily need to be resolved quickly. Urgent matters generally do not warrant a lot of discussion. Matters that are both urgent and important are clearly serious priorities that need careful planning and management.

You can avoid the pressure for 'Any Other Business' at the end of the meeting if you circulate a draft agenda in advance of the meeting, and ask for any other items for consideration. ('Any Other Business' often creates a free-for-all session that wastes time, and gives rise to new tricky expectations, which if not managed properly then closes the meeting on a negative note.)

Meeting outcomes

Decide the type of outcome (i.e., what is the purpose) for each issue, and put this on the agenda alongside the item heading. This is important as people need to know what is expected of them, and each item will be more productive with a clear aim at the outset. Typical types of outcomes are:

- Decision
- Discussion
- Information
- Planning (eg workshop session)
- Generating ideas
- Getting feedback
- Finding solutions
- Agreeing (targets, budgets, aims, etc)
- Policy statement
- Team-building/motivation
- Guest speaker - information, initiatives, etc.

Meeting sequence

Put the less important issues at the top of the agenda, not the bottom. If you put them on the bottom you may never get to them because you'll tend to spend all the time on the big issues.

Ensure any urgent issues are placed up the agenda. Non-urgent items place down the agenda - if you are going to miss any you can more easily afford to miss these.

Try to achieve a varied mix through the running order - if possible avoid putting heavy controversial items together - vary the agenda to create changes in pace and intensity.

Be aware of the tendency for people to be at their most sensitive at the beginning of meetings, especially if there are attendees who are keen to stamp their presence on proceedings. For this reason it can be helpful to schedule a particularly controversial issue later in the sequence, which gives people a chance to settle down and relax first, and maybe get some of the sparring out of their systems over less significant items.

Also be mindful of the lull that generally affects people after lunch, so try to avoid scheduling the most boring item of the agenda at this time; instead after lunch get people participating and involved, whether speaking, presenting, debating or doing other active things.

Meeting timings (of agenda items)

Consider the time required for the various items rather than habitually or arbitrarily decide the length of the meeting. Allocate a realistic time slot for each item. Keep the timings realistic - usually things take longer than you think.

Long meetings involving travel for delegates require pre-meeting refreshments 30 minutes prior to the actual meeting start time.

Put plenty of breaks into long meetings. Unless people are participating and fully involved, their concentration begins to drop after just 45 minutes. Breaks don't all need to be 20 minutes for coffee and cigarettes. Five minutes every 45-60 minutes for a quick breath of fresh air and leg-stretch will help keep people attentive.

Unless you have a specific reason for arranging one, avoid formal sit-down restaurant lunches - they'll add at least 30 minutes unnecessarily to the lunch break, and the whole thing makes people drowsy. Working lunches are great, but make sure you give people 10-15 minutes to get some fresh air and move about outside the meeting room. If the venue is only able to provide lunch in the restaurant, arrange a buffet, or if a sit-down meal is unavoidable save some time by the giving delegates' menu choices to the restaurant earlier in the day.

It's not essential, but it is usually helpful, to put precise (planned) times for each item on the agenda. What is essential however is for **you** to have thought about and planned the timings so you can run the sessions according to a schedule. In other words, if the delegates don't have precise timings on their agendas - make sure you have them on yours. This is one of the biggest responsibilities of the person running the meeting, and is a common failing, so plan and manage this aspect firmly. People will generally expect you to control the timekeeping, and will usually respect a decision to close a discussion for the purpose of good timekeeping, even if the discussion is still in full flow.

Meeting attendees

It's often obvious who should attend; but sometimes it isn't. Consider inviting representatives from other departments to your own department meetings - if relationships are not great they will often appreciate being asked, and it will help their understanding of your issues, and your understanding of theirs.

Having outside guests from internal and external suppliers helps build relationships and strengthen the chain of supply, and they can often also shed new light on difficult issues too. Use your discretion though - certain sensitive issues should obviously not be aired with 'outsiders' present.

Avoid and resist senior managers and directors attending your meetings unless you can be sure that their presence will be positive, and certainly not intimidating. Senior people are often quick to criticise and pressurise without knowing the facts, which can damage team relationships, morale, motivation and trust.

If you must have the boss at your meeting, try to limit their involvement to lunch only, or presenting the awards at the end of the meeting. In any event, tell your boss what you are trying to achieve at the meeting and how - this gives you more chance in controlling possible interference.

Meeting date

Ensure the date you choose causes minimum disruption for all concerned. It's increasingly difficult to gather people for meetings, particularly from different departments or organisations. So take care when finding the best date - it's a very important part of the process, particularly if senior people are involved.

For meetings that repeat on a regular basis the easiest way to set dates is to agree them in advance at the first meeting when everyone can commit there and then. Try to schedule a year's worth of meetings if possible, then you can circulate and publish the dates, which helps greatly to ensure people keep to them and that no other priorities encroach.

Pre-planning meeting dates is one of the keys to achieving control and well-organised meetings. Conversely, leaving it late to agree dates for meetings will almost certainly inconvenience people, which is a major source of upset.

Generally try to consult to get agreement of best meeting dates for everyone, but ultimately you will often need to be firm. Use the 'inertia method', i.e., suggest a date and invite alternative suggestions, rather than initially asking for suggestions, which rarely achieves a quick agreement.

Meeting time

Times to start and finish depend on the type and duration of the meeting and the attendees' availability, but generally try to start early, or finish at the end of the working day. Two-hour meetings in the middle of the day waste a lot of time in travel. Breakfast meetings are a good idea in certain cultures, but can be too demanding in more relaxed environments. If attendees have long distances to travel (i.e., more than a couple of hours, consider overnight accommodation on the night before.

If the majority have to stay overnight it's often worth getting the remainder to do so as well because the team building benefits from evening socialising are considerable, and well worth the cost of a hotel room. Overnight accommodation the night before also allows for a much earlier start. By the same token, consider people's travelling times after the meeting, and don't be unreasonable - again offer overnight accommodation if warranted - it will allow a later finish, and generally keep people happier.

As with other aspects of the meeting arrangements, if in doubt always ask people what they prefer. Why guess when you can find out what people actually want, especially if the team is mature and prefers to be consulted anyway.

Meeting venue

Many meetings are relatively informal, held in meeting rooms 'on-site' and do not warrant extensive planning of the venue as such. On the other hand, big important meetings held off-site at unfamiliar venues very definitely require a lot of careful planning of the venue layout and facilities. Plan the venue according to the situation - leave nothing to chance.

Venue choice is critical for certain sensitive meetings, but far less so for routine, in-house gatherings. Whatever, there are certain preparations that are essential, and never leave it all to the hotel conference organiser or your own facilities department unless you trust them implicitly. Other people will do their best but they're not you, and they can't know exactly what you want. You must ensure the room is right - mainly, that it is big enough with all relevant equipment and services. It's too late to start hunting for a 20ft power extension lead five minutes before the meeting starts.

Other aspects that you need to check or even set up personally are:

- table and seating layout
- top-table (if relevant) position
- tables for demonstration items, paperwork, hand-outs, etc
- electricity power points and extensions
- heating and lighting controls
- projection and flip chart equipment positioning and correct operation
- whereabouts of toilets and emergency exits - fire drill
- confirm reception and catering arrangements
- back-up equipment contingency

All of the above can and will go wrong unless you check and confirm - when you book the venue and then again a few days before the meeting.

For a big important meeting, you should also arrive an hour early to check everything is as you want it. Some meetings are difficult enough without having to deal with domestic or logistics emergencies; and remember if anything goes wrong it reflects on you - it's your credibility, reputation and control that's at stake.

Positioning of seating and tables is important, and for certain types of meetings it's crucial. Ensure the layout is appropriate for the occasion:

- Formal presentations to large groups - theatre-style - the audience in rows, preferably with tables, facing the chairman.
- Medium-sized participative meetings - horse-shoe (U) table layout with the open part of the U facing the chairman's table, or delegates' tables arranged 'cabaret' style.
- Small meetings for debate and discussion - board-room style - one rectangular table with chairman at one end.
- Relaxed team meetings for planning and creative sessions - lounge style, with easy chairs and coffee tables.

Your own positioning in relation to the group is important. If you are confident and comfortable and your authority is in no doubt you should sit close to the others, and can even sit among people. If you expect challenge or need to control the group strongly set yourself further away and clearly central, behind a top-table at the head of things.

Ensure everyone can see screens and flip charts properly - actually sit in the chairs to check - you'll be surprised how poor the view is from certain positions.

Set up of projectors and screens is important - strive for the perfect rectangular image, as this gives a professional, controlled impression as soon as you start. Experiment with the adjustment of projector and screen until it's how you want it. If you are using LCD projector and overhead projector (a rare beast these days) you may need two screens. A plain white wall is often better than a poor screen.

People from the western world read from left to right, so if you want to present anything in order using different media, set it up so that people can follow it naturally from left to right. For instance show introductory bullet points (say on a flip chart on the left - as the audience sees it) and the detail for each point (say on projector and screen on the right).

Position screens and flip chart where they can be used comfortably without obscuring the view. Ensure the speaker/chairman's position is to the side of the screen, not in front of it obscuring the view.

Ensure any extension leads and wiring is taped to the floor or otherwise safely covered and protected.

Supply additional flip chart easels and paper, or write-on acetates and pens, for syndicate work if applicable. You can also ask people to bring laptops for exercises and presentation to the group assuming you have LCD projector is available and compatible.

In venues that have not been purpose-built for modern presentations, sometimes the lighting is problematical. If there are strong fluorescent lights above the screen that cannot be switched off independently, it is sometimes possible for them to be temporarily disconnected (by removing the starter, which is a small plastic cylinder plugged into the side of the tube holder). In older buildings it sometimes possible to temporarily remove offending light-bulbs if they are spoiling the visual display, but always enlist the help of one of the venue's staff rather than resorting to DIY.

Finally, look after the venue's staff - you need them on your side. Most business users treat hotel and conference staff disdainfully - show them some respect and appreciation and they will be more than helpful.

Meeting planner checklist

There's a lot to remember, so, particularly for big important meetings and training sessions, use a meetings checklist to make sure you plan properly and don't miss anything:

Meetings Checklist

	done	comments	date/ref
Agenda			
Priorities			
Outcomes			
Sequence			

Timings			
Attendees			
Date			
Time			
Venue			
Variety			
Notification			
Notes of last meeting			
Directions/map			
Materials (as required by agenda items)			
Reference material for ad-hoc queries			
Results and performance data			
Equipment (make separate check-list)			
Electrical Power (if applicable)			
Domestics			
Catering arrangements			
Note-paper, pens, name-plates			
Refreshments			
Guest care/instructions			

Meeting agenda

Produce the meeting agenda. This is the tool with which you control the meeting. Include all the relevant information and circulate it in advance. If you want to avoid having the ubiquitous and time-wasting 'Any Other Business' on your agenda, circulate the agenda well in advance and ask for additional items to be submitted for consideration.

Formal agendas for board meetings and committees will normally have an established fixed format, which applies for every meeting. This type of formal agenda normally begins with:

1. apologies for absence
2. approval of previous meeting's minutes (notes)
3. matters arising (from last meeting) and then the main agenda, finishing with 'any other business'.

For more common, informal meetings (departmental, sales teams, projects, ad-hoc issues, etc), try to avoid the formality and concentrate on practicality. For each item, explain the purpose, and if a decision is required, say so. If it's a creative item, say so. If it's for information, say so. Put timings, or time-per-item, or both (having both is helpful for you as the chairman). If you have guest speakers or presenters for items, name them. Plan coffee breaks and a lunch break if relevant, and ensure the caterers are informed. Aside from these formal breaks you should allow natural 'comfort' breaks every 45-60 minutes, or people lose concentration and the meeting becomes less productive.

Sample meeting agenda

(Meeting Title) Monthly Sales Meeting - New Co - Southern Region
(Venue, Time, Date) Conference Room, New Co, Newtown - 0900hrs Monday 09/05/04
Agenda
Coffee available from 0830hrs - Dress is smart casual.

09:00	Warm up and introductions.	New starters Sue Smith and Ken Brown. Guests are Jane Green, Fleet Manager; Jim Long, Off-shore Product Manager; and Bill Sykes, Tech-range Chief Engineer.	15
09:15	Health and safety update.	Revised procedures for hazardous chemicals at Main Street production facility.	15
09:30	Product revision update.	Tech-range Model 3 now has stand-by mode control. Product will be demonstrated.	30
10:00	Coffee	Chance for hands-on the new Model 3.	15
10:15	Sales results & forecasts.	Ensure you bring qtr2 forecast data and be prepared to present prospect lists and activities.	60
11:15	New product launch.	The new Digi-range is launched in month five. Product demonstrations and presentation of performance data, USP's, benefits for key sectors, and details of launch promotion.	60
12:30	Major accounts initiatives.	Brainstorm session - How can we accelerate major accounts development in offshore sector? - Do some preparatory thinking about this please.	45
13:15	Lunch	Buffet in the meeting room.	45
14:00	New product launch.	The new Digi-range is launched in month five. Product demonstrations and presentation of performance data, USP's, benefits for key sectors, and details of launch promotion.	120
16:00	Coffee		30
16:30	New Company Car Scheme.	Presentation from Fleet Manager Jane Green about the new car scheme.	45
17:15	Awards and Incentive.	Qtr 1 Sales Awards and launch of Qtr 2 Sales Incentive.	45
18:00	Meeting review, questions, close.		30

Running the meeting

The key to success is keeping control. You do this by sticking to the agenda, managing the relationships and personalities, and concentrating on outcomes. Meetings must have a purpose. Every item must have a purpose. Remind yourself and the group of the required outcomes and steer the proceedings towards making progress, not hot air.

Politely suppress the over-zealous, and encourage the nervous. Take notes as you go, recording the salient points and the agreed actions, with names, measurable outcomes and deadlines. Do not record everything word-for-word, and if you find yourself taking over the chairmanship of a particularly stuffy group which produces reams of notes and very little else, then change things. Concentrate on achieving the outcomes you set the meeting when you drew up the agenda. Avoid racing away with decisions if your aim was simply discussion and involving people. Avoid hours of discussion if you simply need a decision. Avoid debate if you simply need to convey a policy issue. Policy is policy and that is that.

Defer new issues to another time. Practice and use the phrase 'You may have a point, but it's not for this meeting - we'll discuss it another time.' (And then remember to do it.)

If you don't know the answer say so - be honest - don't waffle - say that you'll get back to everyone with the answer, or append it to the meeting notes.

If someone persistently moans on about a specific issue that is not on the agenda, quickly translate it into a simple exploratory or investigative project, and bounce it back to them, with a deadline to report back their findings and recommendations to you.

Use the rules on delegation to help you manage people and tasks and outcomes through meetings.

Always look at how people are behaving in meetings - look for signs of tiredness, exasperation, and confusion, and take necessary action.

As a general rule, don't deviate from the agenda, but if things get very heavy, and the next item is very heavy too, swap it around for something participative coming later on the agenda - a syndicate exercise, or a team game, a quiz, etc.

Meetings notes or meetings minutes

Who takes the meeting notes or minutes, keeps command (minutes is a more traditional term, and today describes more formal meetings notes).

You must take the notes yourself, unless the meeting format dictates a formal secretary, in which case ensure the secretary is on your side. Normally you'll be able to take the notes. They are your instrument of control, so don't shirk it or give them to someone else as the 'short straw'.

If you are seen to take the notes, two things happen:

- people respect you for not forcing them to do it
- people see that you are recording agreed actions, so there's no escaping them

Meeting notes are essential for managing meeting actions and outcomes. They also cement agreements and clarify confusions. They also prevent old chestnuts reappearing. A meeting without notes is mostly pointless. Actions go unrecorded and therefore forgotten. Attendees feel that the meeting was largely pointless because there's no published record.

After the meeting, type the notes (it's usually quicker for you to do it), and circulate them straight away, copy to all attendees, including date of next meeting if applicable, and copy to anyone else who should see the notes.

The notes should be brief or people won't read them, but they must still be precise and clear. Include relevant facts, figures, accountabilities, actions and timescales. Any agreed actions must be clearly described, with person or persons named responsible, with a deadline. See again rules of delegation. Use the acronym SMART for any agreed action (Specific, Measurable, Agreed, Realistic, Timebound). See more acronyms for meetings and training sessions on the acronyms page, there are lots of useful tips there.

The final crucial element is following up the agreed actions (your own included). If you run a great meeting, issue great notes, and then fail to ensure the actions are completed, all is lost, not least your credibility. You must follow up agreed actions and hold people to them. If you don't they will very soon learn that they can ignore these agreements every time - negative conditioning - it's the death of managing teams and results. By following up agreed actions, at future meetings particularly, (when there is an eager audience waiting to see who's delivered and who hasn't), you will positively condition your people to respond and perform, and you will make meetings work for you and your team.

Meeting notes structure and template

Here is a simple structure for formal meeting notes involving a group of people within an organisation:

- Heading: for example - Notes of Management Meeting (if a one-off meeting to consider a specific issue then include purpose in the heading as appropriate)
- Date and Time:
- Venue:
- Present:
- Apologies for absence:
- In attendance: (if appropriate - guests not normally present at regular meetings, for instance speakers or non-board-members at board meetings)

Followed by numbered agenda items, typically:

- 1. Approval of previous meeting notes/minutes:
- 2. Matters arising: (items arising from meeting or continued from previous meeting which would not be covered by normal agenda items)

And then other items as per agenda, for example (these are some of the many possible typical reports and meeting items discussed within a business or board meeting; other types of meetings would have different item headings):

- 3. Finance/financial performance
- 4. Sales
- 5. Marketing and Business Development
- 6. Operations or Divisional Activities
- 7. Manufacturing
- 8. Distribution
- 9. Environmental
- 10. Quality Assurance, etc
- 11. Human Resources
- 12. Projects
- 13. Communications and Team Briefing Core Brief
- 14. Any other business (AOB - issues not covered under other agenda items)
- 15. Date of next meeting
- Time meeting finished (normally for formal meetings only)
- Signed and dated as a true record (signed by the chair-person - normally for formal meetings only)
- Writer's initials, file reference and date (useful on all types of meeting notes)

Normally the items and points within each item are numbered 1.1, 1.2, 1.3, etc., then 2.1, 2.2, 2.3, 2.4, etc.

Importantly, all actions agreed in the meeting need to be allocated to persons present at the meeting. It is not normally appropriate or good practice to allocate an action to someone who is not present at the meeting. Actions that are agreed but not allocated to anyone will rarely be implemented. (See the article on delegation.)

Responsibility for actions can be identified with a person's name or initials as appropriate.

Action points and persons responsible can be highlighted or detailed in a right-margin column if helpful.

These days verbatim minutes (precise word-for-word records) are only used in the most formal situations. Modern meeting notes should ideally concentrate on actions and agreements.

Reports should if possible be circulated in advance of meetings giving delegates adequate time to read and formulate reactions and answers to any queries raised. It is not good practice to table a report at a meeting if opportunity exists to circulate the report beforehand.

Reports can be appended to the meeting notes or minutes to which they relate.

Meeting notes template

<table>
<tr><td>Heading:
Date and Time:
Venue:
Present:
Apologies for absence:
In attendance:</td><td></td></tr>
<tr><td>notes, agreements and actions (change item headings as applicable)</td><td>person responsible for each action agreed</td></tr>
<tr><td>1. Approval of previous meeting notes/minutes:
2. Matters arising:
3. Finance/financial performance
4. Sales
5. Marketing and Business Development
6. Operations or Divisional Activities
7. Manufacturing
8. Distribution
9. Environmental
10. Quality Assurance, etc
11. Human Resources
12. Projects
13. Communications and Team Briefing Core Brief
14. Any other business
15. Date of next meeting</td><td></td></tr>
<tr><td colspan="2">Time meeting finished:</td></tr>
<tr><td colspan="2">Signed and dated as a true record............................</td></tr>
<tr><td colspan="2">Writer's initials, file reference and date:</td></tr>
</table>

CASES

CASE 1

Letters for Discussion—Landscape Plants

Your nursery sells plants not only in your store but also by mail order. Today you've received a letter from Pat Sykes, complaining that the plants (in a $572 order) did not arrive in a satisfactory condition. "All of them were dry and wilted. One came out by the roots when I took it out of the box. Please send me a replacement shipment immediately."

The following letters are possible approaches to answering this complaint. How well does each message meet the needs of the reader, the writer, and the organization? Is the message clear, complete, and correct? Does it save the reader's time? Does it build goodwill?

✓ Dear Sir:

I checked to see what could have caused the defective shipment you received. After ruling out problems in transit, I discovered that your order was packed by a new worker who didn't understand the need to water plants thoroughly before they are shipped. We have fired the worker, so you can be assured that this will not happen again.

Although it will cost our company several hundred dollars, we will send you a replacement shipment. Let me know if the new shipment arrives safely. We trust that you will not complain again.

✓ Dear Pat:

Sorry we screwed up that order. Sending plants across country is a risky business. Some of them just can't take the strain. (Some days I can't take the strain myself!) We'll send you some more plants sometime next week and we'll credit your account for $372.

✓ Dear Mr. Smith:

I'm sorry you aren't happy with your plants, but it isn't our fault. The box clearly says, "Open and water Immediately." If you had done that, the plants would have been fine. And anybody who is going to buy plants should know that a little care is needed. If you pull by the leaves, you will pull the roots out. Since you don't know how to handle plants, I'm sending you a copy of our brochure, "How to Care for Your Plants." Please read it carefully so that you will know how to avoid disappointment in the future.

We look forward to your future orders.

✓ Dear Ms. Sykes:

Your letter of the 5th has come to the attention of the undersigned.

According to your letter, your invoice #47420 arrived in an unsatisfactory condition. Please be advised that it is our policy to make adjustments as per the Terms and Conditions listed on the reverse side of our Acknowledgment of Order. If you will read that document, you will find the following:

"... if you intend to assert any^laim against us on this account, you shall make an exception on your receipt to the carrier and shall, within 30 days after the receipt of any such goods, furnish us detailed written information as to any damage. "

Your letter of the 5th does not describe the alleged damage in sufficient detail. Furthermore, the delivery receipt contains no indication of any exception. If you expect to receive an adjustment, you must comply with our terms and see that the necessary documents reach the undersigned by the close of the business day on the 20th of the month.

✓ Dear Pat Sykes:

You'll get a replacement shipment of the perennials you ordered next week.

Your plants are watered carefully before shipment and packed in specially designed cardboard containers. But if the weather is unusually warm, or if the truck is delayed, small root balls may dry out. Perhaps this happened with your plants. Plants with small root balls are easier to transplant, so they do better in your yard.

The violas, digitalis, aquilegias, and hostas you ordered are long-blooming perennials that will get even prettier each year. Enjoy your garden!

E-Mail Messages for Discussion—Announcing a Web Page

The Acme Corporation has just posted its first Web page. Ed Zeplin in Management Information Systems MIS), who has created the page, wants employees to know about it.

The following e-mail messages are possible approaches. How well does each message meet the needs of the reader, the writer, and the organization? Is the message clear, complete, and correct? Does it save the reader's time? Does it build goodwill?

✓ Subject: It's Ready!

I am happy to tell you that my work is done. Two months ago the CEO finally agreed to fund a Web page for Acme, and now the work of designing and coding is done. At last, Acme has joined the 20th century (which is now over).

I wanted all of you to know about Acme's page. (Actually it's over 40 pages.) Now maybe the computerphobes out there will realize that you really do need to learn how to use this stuff. Sign up for the next training session! The job you save may be my own.

If you have questions, please do not hesitate to contact me.

L. Ed Zeplin, MIS

2.

Subject: Web Page

Check out the company Web page at www.server.acme.com/homepage.html

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Subject: Visit Our Web Page

Our Web pages are finally operational. The 43 pages take 460 MB on the server and were created using HoT MetaL, a program designed to support HTML creation. Though the graphics are sizable and complex, interlacing and code specifying the pixel size serve to minimize download time. Standard HTML coding is enhanced with forms, Java animation, automatic counters, and tracking packages to ascertain who visits our site.

The site content was determined by conducting a survey of other corporate Web sites to become cognizant of the pages made available by our competitors and other companies. The address of our Web page is www.server/acme/com/homepage.html. It is believed that this site will support and enhance our marketing and advertising efforts, improving our outreach to desirable demographic and psychographic marketing groups.

L. Ed Zeplin, MIS

Voice: 713-555-2879 Fax: 713-555-2880 e-mail: zeplin.1@acme.com

"Only the wired life is worth living."—Anonymous

Subject: Web Page Shows Acme Products to the World, Offers Tips to Consumers, and Tells Prospective Employees about Job Possibilities

Since last Friday, Acme's been on the World Wide Web. If you have a computer with Internet access, check out the page at www.server.acme.com/homepage.html. You can't view the page if you don't have a computer or if you're still using a Mac SE or a 286.

I have included pages on our products, tips for consumers, and job openings at Acme in the hope of making our page useful and interesting. Content is the number one thing that brings people back, but I've included some snazzy graphics, too.

When I asked people for ideas for the company pages, almost nobody responded. But if seeing the page inspires you, let me know what else you'd like. I'll try to fit it into my busy schedule.

So check it out. But don't spend too much time on the Web: you need to get your work done, too!

L. Ed Zeplin, MIS
zeplin.1@acme.com
Today's Joke
Fun Links

Subject: How to Access Acme's Web Page

Tell your customers that Acme is now on the Web:

www.server.acme.com/homepage.html

Web pages offer another way for us to bring our story to the public. Other companies have found that Web pages increase sales, often reaching customers far from normal sales and distribution channels. Our advertisements and packaging will feature our Web address. And people who check out our Web page can learn even more about our commitment to quality, protecting the environment, and meeting customer needs.

If you'd like to learn more about how to use the Web or how to create Web pages for your unit, sign up for one of our workshops. For details and online registration, see www.server.acme.com/training.

If you have comments on Acme's Web pages or suggestions for making them even better, just let me know.

L. Ed Zeplin zeplin.1@acme.com

Discussing Strengths

Introduce yourself to a small group of other students. employer. These can be experience, knowledge, or per- Identify three of your strengths that might interest an sonality traits (like enthusiasm).

Communicating at Work

Memo Assignments

Introducing Yourself to Your Instructor

Write a memo (at least 1/2 pages long) introducing yourself to your instructor. Include the following topics:

Background: Where did you grow up? What have you done in terms of school, extracurricular activities, jobs, and family life?

Interests: What are you interested in? What do you like to do? What do you like to think about and talk about?

Achievements: What achievements have given you the greatest personal satisfaction? List at least five. Include things that gave you a real sense of accomplishment and pride, whether or not they're the sort of thing you'd list on a rйsumй.

Goals: What do you hope to accomplish this term? Where would you like to be professionally and personally five years from now?

Use complete memo format with appropriate headings.

Use a conversational writing style; check your draft to polish the style and edit for mechanical and grammatical correctness. A good memo will enable your instructor to see you as an individual. Use specific details to make your memo vivid and interesting. Remember that one of your purposes is to interest your reader!

Introducing Yourself to Your Collaborative Writing Group

Write a memo (at least 1/2 pages long) introducing yourself to the other students in your collaborative writing group. Include the following topics:

Background: What is your major? What special areas of knowledge do you have? What have you done in terms of school, extracurricular activities, jobs, and family life?

Previous experience in groups: What groups have you worked in before? Are you usually a leader, a follower, or a bit of both? Are you interested in a quality product? In maintaining harmony in the group? In working efficiently? What do you like most about working in groups? What do you like least?

Work and composing style: Do you like to talk out ideas while they're in a rough stage or work them out on paper before you discuss them? Would you rather have a complete outline before you start writing or just a general idea? Do you want to have a detailed schedule of everything that has to be done and who will do it, or would you rather "go with the flow"? Do you work best under pressure, or do you want to have assignments ready well before the due date?

Areas of expertise: What can you contribute to the group in terms of knowledge and skills? Are you good at brainstorming ideas? Researching? Designing charts? Writing? Editing? Word processing? Managing the flow of work? Maintaining group cohesion? Goals for collaborative assignments: What do you hope to accomplish this term? Where does this course fit into your priorities?

Use a conversational writing style; edit your final draft for mechanical and grammatical correctness. A good memo will enable others in your group to see you as an individual. Use details to make your memo vivid and interesting. Remember that one of your purposes is to make your readers look forward to working with you!

CASE 2

Identifying Sources of Miscommunication

In each of the following situations, identify one or more ways that cultural differences may be leading to miscommunication.

1. Alan is a U.S. sales representative in South America. He makes appointments and is careful to be on time. But the person he's calling on is frequently late. To save time, Alan tries to get right to business. But his hosts want to talk about sightseeing and his family. Even worse, his appointments are interrupted constantly, not only by business phone calls but also by long conversations with other people and even the customers' children who come into the office. Alan's first progress report is very negative. He hasn't yet made a sale. Perhaps South America just isn't the right place to sell his company's products.

2. To help her company establish a presence in Asia, Susan wants to hire a local interpreter who can advise her on business customs. Kana Tomari has superb qualifications on paper. But when Susan tries to probe about her experience, Kana just says, "I will do my best. I will try very hard." She never gives details about any of the previous positions she's held. Susan begins to wonder if the rйsumй is inflated.

3. Stan wants to negotiate a joint venture with an Asian company. He asks Tung-Sen Lee if the people have enough discretionary income to afford his product. Mr. Lee is silent for a time, and then says, "Your product is good. People in the West must like it." Stan smiles, pleased that Mr. Lee recognizes the quality of his product, and he gives Mr. Lee a contract to sign. Weeks later, Stan still hasn't heard anything. If Asians are going to be so nonresponsive, he wonders if he really should try to do business with them.

4. Elspeth is very proud of her participatory management style. On assignment in India, she is careful not to give orders but to ask for suggestions. But people rarely suggest anything. Even a formal suggestion system doesn't work. And to make matters worse, she doesn't sense the respect and camaraderie of the plant she managed in the United States. Perhaps, she decides gloomily, people in India just aren't ready for a woman boss.

Many multinationals have separate web pages for their operations in various countries. For example, Coca-Cola's pages include pages for Belgium, France, and Japan. Analyze three of the country pages of a company of your choice.

■ Is a single template used for pages in different countries, or do the basic designs differ?

■ Are different images used in different countries? What do the images suggest?
■ If you can read the language, analyze the links. What information is emphasized?
■ To what extent are the pages similar? To what extent do they reveal national and cultural differences?

As your instructor directs,

a. Write a memo analyzing the similarities and differences you find. Attach printouts of the pages to your memo.

b. Make an oral presentation to the class. Paste the web pages into PowerPoint slides.

c. Join with a small group of students to create a group report comparing several companies' web pages in three specific countries. Attach printouts of the pages.

d. Make a group oral presentation to the class.

Recommending a Candidate for an Overseas Position

Your company sells customized computer systems to businesses large and small around the world. The Executive Committee needs to recommend someone to begin a three-year term as Manager of Eastern European Marketing.

As your instructor directs,

a. Write a memo to each of the candidates, specifying the questions you would like each to answer in a final interview.

b. Assume that it is not possible to interview the candidates. Use the information here to write a memo to the CEO recommending a candidate.

c. Write a memo to the CEO recommending the best way to prepare the person chosen for his or her assignment.

d. Write a memo to the CEO recommending a better way to choose candidates for international assignments.

e. Write a memo to your instructor explaining the assumptions you made about the company and the candidates that influenced your recommendation(s).

Information about the candidates:

All the candidates have applied for the position and say they are highly interested in it.

1. **Deborah Gere,** 39, white, single. Employed by the company for eight years in the Indianapolis and New York offices. Currently in the New York office as Assistant Marketing Manager, Eastern United States; successful. University of Indiana MBA. Speaks Russian fluently; has translated for business negotiations that led to the setting up of the Moscow office. Good technical knowledge, acceptable managerial skills, excellent communication skills, good interpersonal skills. Excellent health; excellent emotional stability. Swims. One child, age 12. Lived in the then–Soviet Union for one year as an exchange student in college; business and personal travel in Europe.

2. **Claude Chabot,** 36, French, single. Employed by the company for 11 years in the Paris and London offices. Currently in the Paris office as Assistant Sales Manager for the

European Economic Community; successful. No MBA, but degrees from MIT in the United States and l'Ecole Supйrieure de Commerce de Paris. Speaks native French; speaks English and Italian fluently; speaks some German. Good technical knowledge, excellent managerial skills, acceptable communication skills, excellent interpersonal skills. Excellent health, good emotional stability. Plays tennis. No children. French citizen; lived in the United States for two years, in London for five years (one year in college, four years in the London office). Extensive business and personal travel in Europe.

3. **Linda Moss,** 35, African American, married. Employed by the company for 10 years in the Atlanta and Toronto offices. Currently Assistant Manager of Canadian Marketing; very successful. Howard University MBA. Speaks some French. Good technical knowledge, excellent managerial skills, excellent communication skills, excellent interpersonal skills. Excellent health; excellent emotional stability. Does Jazzercize classes. Husband is an executive at a U.S. company in Detroit; he plans to stay in the States with their children, ages 11 and 9. The couple plans to commute every two to six weeks. Has lived in Toronto for five years; business travel in North America; personal travel in Europe and Latin America.

4. **Steven Hsu,** 42, of Asian American descent, married. Employed by the company for 18 years in the Los Angeles office. Currently Marketing Manager, Western United States; very successful. UCLA MBA. Speaks some Korean. Excellent technical knowledge, excellent managerial skills, good communication skills, excellent interpersonal skills. Good health, excellent emotional stability. Plays golf. Wife is an engineer who plans to do consulting work in eastern Europe. Children ages 8, 5, and 2. Has not lived outside the United States; personal travel in Europe and Asia.

Your committee has received this memo from the CEO.

To: Executive Committee
From: Ed Conzachi *EC*
Subject: Choosing a Manager for the New Eastern European Office

Please write me a memo recommending the best candidate for Manager of East European Marketing. In your memo, tell me whom you're choosing and why; also explain why you have rejected the unsuccessful candidates.

This person will be assuming a three-year appointment, with the possibility of reappointment. The company will pay moving and relocation expenses for the manager and his or her family.

The Eastern European division currently is the smallest of the company's international divisions. However, this area is poised for growth. The new manager will supervise the Moscow office and establish branch offices as needed.

The committee has invited comments from everyone in the company. You've received these memos.

To: Executive Committee
From: Robert Osborne, U.S. Marketing Manager *RO*
Subject: Recommendation for Steve Hsu

Steve Hsu would be a great choice to head up the new Moscow office. In the past seven years, Steve has increased sales in the Western Region by 15%—in spite of recessions, earthquakes, and fires. He has a low-key, participative style that brings out the best in subordinates. Moreover, Steve is a brilliant computer programmer. He probably understands our products better than any other marketing or salesperson in the company.

Steve is clearly destined for success in headquarters. This assignment will give him the international experience he needs to move up to the next level of executive success.

To: Executive Committee
From: Becky Exter, Affirmative Action Officer *BE*
Subject: Hiring the New Manager for East European Marketing

Please be sensitive to affirmative action concerns. The company has a very good record of appointing women and minorities to key positions in the United States and Canada; so far our record in our overseas divisions has been less effective.

In part, perhaps, that may stem from a perception that women and minorities will not be accepted in countries less open than our own. But the experience of several multinational firms has been that even exclusionary countries will accept people who have the full backing of their companies. Another concern may be that it will be harder for women to establish a social support system abroad. However, different individuals have different ways of establishing support. To assume that the best candidate for an international assignment is a male with a stay-at-home wife is discriminatory and may deprive our company of the skills of some of its best people.

We have several qualified women and minority candidates. I urge you to consider their credentials carefully.

To: Executive Committee
From: William E. Dortch, Marketing Manager, European Economic Community *WED*
Subject: Recommendation for Debbie Gere

Debbie Gere would be my choice to head the new Moscow office. As you know, I recommended that Europe be divided and that we establish an Eastern European division. Of all the people from the States who have worked on the creation of the new division, Debbie is the best. The negotiations were often complex. Debbie's knowledge of the language and culture was invaluable. She's done a good job in the New York office and is ready for wider responsibilities. Eastern Europe is a challenging place, but Debbie can handle the pressure and help us gain the foothold we need

To: Ed Conzachi, President
From: Pierre Garamond, Sales Representative, European Economic Community *PG*
Subject: Recommendation for Claude Chabot

Claude Chabot would be the best choice for Manager of Eastern European Marketing. He is a superb supervisor, motivating us to the highest level of achievement. He understands the complex legal and cultural nuances of selling our products in Europe as only a native can. He also has the budgeting and managerial skills to oversee the entire marketing effort.

You are aware that the company's record of sending U.S. citizens to head international divisions is not particularly good. European Marketing is an exception, but our records in the Middle East and Japan have been poor. The company would gain stability by appointing Europeans to head European offices, Asians to head Asian offices, and so forth. Such people would do a better job of managing and motivating staffs which will be comprised primarily of nationals in the country where the office is located. Ending the practice of reserving the top jobs for U.S. citizens would also send a message to international employees that we are valued and that we have a future with this company.

To: Executive Committee
From: Elaine Crispell, Manager, Canadian Marketing *EC*
Subject: Recommendation for Linda Moss

Linda Moss has done well as Assistant Manager for the last two and a half years. She is a creative, flexible problem solver. Her productivity is the highest in the office. Though she could be called a "workaholic," she is a warm, caring human being.

As you know, the Canadian division includes French-Speaking Montreal and a large Native Canadian population; furthermore, Toronto is an international and intercultural city. Linda has gained intercultural competence both on a personal and professional level.

Linda has the potential to be our first woman CEO 15 years down the road. She needs more international experience to be competitive at that level. This would be a good opportunity for her, and she would do well for the company.

CASE 3

Review of Key Points

1. What five audiences may your message reach? Give a specific example of each.

2. Describe the communication process. Explain why even simple communications can fail.

3. What is a discourse community? Identify three separate discourse communities you belong to. Identify two symbols (verbal or nonverbal) that differentiate each of your discourse communities.

4. What is organizational culture? Identify three symbols (verbal or nonverbal) that your college/university uses to reflect its culture.

5. What are three ways you can analyze your audience?

6. What is a channel?

7. What are three ways you can adapt your messages to your audience?

Questions for Critical Thinking

1. What are your options if your boss' criteria for a document are different from those of the primary audience?

2. Emphasizing the importance of audience, salespeople often say, "The customer is king," or "The customer is always right," or "The customer control". To what extent do you feel in control as a customer, a citizen, or a student? What could you do to increase your feelings of control?

3. If you are employed, which aspects of your organization's culture match your own values? Describe the culture you would most like to work in.

Exercises and Problems

- ✓ **Identifying Audiences**

In each of the following situations, label the audiences as initial, gatekeeper, primary, secondary,or watchdog.

1. Russell is seeking venture capital so that he can expand his business of offering soccer camps to youngsters. He's met an investment banker whose clients regularly hear presentations from businesspeople seeking capital. The investment banker decides who will get a slot on the program, based on a comprehensive audit of each company's records and business plan.

2. Maria is marketing auto loans. She knows that many car buyers choose one of the financing options presented by the car dealership, so she wants to persuade dealers to include her financial institution in the options they offer.

3. Paul works for the mayor's office in a big city. As part of a citywide cost-cutting measure, a panel has recommended requiring employees who work more than 40 hours in a week to take compensatory time off rather than be paid overtime. The only exceptions will be the police and fire departments. The mayor asks Paul to prepare a proposal for the city council, which will vote on whether to implement the change. Before they vote, council members will hear from (1) citizens, who will have an opportunity to read the proposal and communicate their opinions to the city council; (2) mayors' offices in other cities, who may be asked about their experiences; (3) union representatives, who may be concerned about the reduction in income that will result if the proposal is implemented; (4) department heads, whose ability to schedule work might be limited if the proposal passes; and (5) panel members and government lobbying groups. Council members come up for re-election in six months.

4. Sharon, Steven’s boss at Bigster Corporation, has asked him to write an e-mail for everyone in her division, informing them of HR’s new mandatory training sessions on new government regulations affecting Bigster’s services.

✓ **<u>Choosing a Channel to Reach a Specific Audience</u>**

Suppose that your business, government agency, or non-profit group has a product, service, or program targeted for each of the following audiences. What would be the best channel(s) to reach people in that group in your city? Would that channel reach all group members?

1. Renters

2. Sikh owners of small businesses
3. People who use wheelchairs
4. Teenagers who work part-time while attending school
5. Competitive athletes
6. Parents whose children play soccer
7. People willing to work part-time
8. Financial planners
9. Hunters
10. New immigrants

✓ **Persuading an Organization to Adopt Flextime**

Flextime is a system that allows employees to set their own starting and stopping times.

Flextime is especially appealing to organizations that have a hard time keeping good employees or that cannot easily raise salaries. It is also appealing to companies with the philosophy of giving workers as much independence as possible. Most employees prefer flextime. However, in some organizations, flextime creates conflicts between workers who get the schedules they want and those who have to work traditional hours to cover the phones. Some firms are afraid that the quality of work may suffer if employees and supervisors aren't on the job at the same time. Record keeping may be more complicated.

Identify the major argument that you could use to persuade each of the following organizations to use flextime and the major objection you anticipate. Which of the organizations would be fairly easy to convince? Which would be harder to persuade?

1. A large, successful insurance company
2. A branch bank
3. A small catering service
4. The admissions office on your campus
5. A church, synagogue, temple, or mosque with a staff of two clergy, a director of music, two secretaries, and a custodian

Analyzing the Other Students in Your College or University

6. A government agency

Analyze the students in your college or university. (If your college or university is large, analyze the students in your program of study.) Is there a "typical" student? If all students are quite different, how are they different? Consider the following kinds of information in your analysis:

Demographic Data Age (Average; high and low)

Gender (What proportion are men? What proportion are women?)

Ethnic background (What groups are represented? How many of each?)

Languages

Marital status

Number of children

Parents' income/personal or family income

Going to school full- or part-time

Outside jobs (What kinds? How many hours a week?)

Membership in campus organizations

Religious affiliations

Political preferences

Proportion going on for further education after graduation

Psychographics

What values, beliefs, goals, and lifestyles do students have? Which are common? Which are less common?

What's the relationship between the students' values and their choice of major or program?

What do students hope to gain from the classes they're taking? What motivates them to do their best work in class?

Additional Information

What are students' attitudes toward current campus problems? current political problems?

What is the job market like for students in your school or major? Will students find it easy to get jobs after graduation? How much will they be making? Where will they be working?

After you answer these questions, identify the factors that would be most relevant in each of the following situations:

1. You want to persuade students to participate in an internship program.
2. You want to persuade students to join a campus organization.
3. You want to find out whether there are enough parking spaces on campus.
4. You want to know whether the campus placement office is providing adequate services to students.
5. You want to hire students to staff a business that you're starting.

CASE 4

Analyzing Your Accomplishments

List the 10 accomplishments that give you the most personal satisfaction. These could be things that other people wouldn't notice. They can be things you've done recently or things you did years ago.

Answer the following question for each accomplishment:

1. What skills or knowledge did you use?
2. What personal traits did you exhibit?
3. What about this accomplishment makes it personally satisfying to you?

As Your Instructor Directs,

a. Share your answers with a small group of other students.

b. Summarize your answers in a memo to your instructor.

c. Present your answers orally to the class.

3. What about this accomplishment makes it personally satisfying to you?

As Your Instructor Directs,

a. Share your answers with a small group of other students.

b. Summarize your answers in a memo to your instructor.

c. Present your answers orally to the class.

Remembering What You've Done

Use the following list to jog your memory about what you've done. For each, give three or four details as well as a general statement.

Describe a time when you

1. Used facts and figures to gain agreement on an important point.
2. Identified a problem that a group or organization faced and developed a plan for solving the problem.
3. Made a presentation or a speech to a group.
4. Won the goodwill of people whose continued support was necessary for the success of some loop term project or activity.

5. Interested other people in something that was important to you and persuaded them to take the actions you wanted.

6. Helped a group deal constructively with conflict.

7. Demonstrated creativity.

Evaluating Career Objective Statements

None of the following career objective statements is effective. What is wrong with each statement as it stands? Which statements could be revised to be satisfactory? Which should be dropped?

1. To use my acquired knowledge of accounting to eventually own my own business.

2. A progressively responsible position as a MARKETING MANAGER where education and ability would have valuable application and lead to advancement.

To work with people responsibly and creatively, helping them develop personal and professional skills.

4. A position in international marketing which makes use of my specialization in marketing and my knowledge of foreign markets.

5.To design and maintain Web pages.

Writing a Paper Resume

Write a resume on paper that you could mail to an employer or hand to an interviewer at an interview.

As Your Instructor Directs,

a. Write a resume for the field in which you hope to find a job.

Write two different resumes for two different paths you are interested in pursuing.

c. Adapt your resume to a specific company you hope to work for.

Questions for Critical Thinking

What three questions should form the basis for an interview strategy?
How do you use your interview strategy during an interview?
What are your greatest strengths? How can you demonstrate them during an interview?
What are your weaknesses? How will you deal with them if they come up during an interview?
How do successful interviewees communicate?
What are your options if you are asked what you believe is an illegal interview question? Which option seems best to you? Why?
Is it unethical to practice answering interview questions, so that you come across as very poised at an interview?

Exercises and Problems

Interviewing Job Hunters

Talk to students at your school who are interviewing for jobs this term. Possible questions to ask them include

• What field are you in? How good is the job market in that field this year?
• What questions have you been asked at job inter; views? Were you asked any stress or sexist questions? Any really oddball questions?
• What answers seemed to go over well? What answers bombed?
• Were you asked to take any tests (skills, physical, drugs)?
• How long did you have to wait after a first interview to learn Whether you were being invited for an office visit? How long after an office visit did it take to learn whether you were being offered a job?
• What advice would you have for someone who will be interviewing next term or next year?

As Your Instructor Directs,

a. Summarize your findings in a memo to your instructor.
b. Report your findings orally to the class.
c. Join with a small group of students to write a group report describing the results of your survey.

Interviewing an Interviewer

Talk to someone who regularly interviews candidates for entry-level jobs. Possible questions to ask include the following:

• How long have you been interviewing for your organization? Does everyone on the management ladder at your company do some interviewing, or do people specialize in it?
• Do you follow a set structure for interviews? What are some of the standard questions you ask?
• What are you looking for? How important are (1) good grades, (2) leadership roles in extracurricular groups, or (3) relevant work experience?
What advice would you give to someone who doesn't have one or more of these?
• What are the things you see students do that create a poor impression? Think about the worst candidate you've interviewed. What did he or she do (or not do) to create such a negative impression?
• What are the things that make a good impression?
Recall the best student you've ever interviewed.
Why did he or she impress you so much?
• How does your employer evaluate and reward your success as an interviewer?
• What advice would you have for someone who still has a year or so before the job hunt begins?
As Your Instructor Directs,
a. Summarize your findings in a memo to your instructor.
b. Report your findings orally to the class.
c. Join with a small group of students to write a group report describing the results of your survey.
d. Write to the interviewer thanking him or her for taking the time to talk to you.

Preparing Answers to Behavioral Interview Questions

Answer the questions in Figure 9.1.
As Your Instructor Directs,

a) Share your answers with a small group of other students.
b) Present your answers in a memo to your instructor, and explain why you've chosen the examples you describe.
c) Present your answers orally to the class.

Preparing Questions to Ask Employers
Prepare a list of questions to ask at job interviews.
1. Prepare a list of three to five general questions that apply to most employers in your field.
2. Prepare two to five specific questions for each of the three companies you are most interested in.
As Your Instructor Directs,
a. Share the questions with a small group of other students.

b. List the questions in a memo to your instructor.
c. Present your questions orally to the class.

CASE 6

Brainstorming Ways to Resolve Conflicts

Suggest one or more ways that each of the following teams could deal with the conflict(s) it faces.

1. Mike and Takashi both find writing hard. Elise has been getting better grades than either of them, so they offer to do all the research if she'll organize the document and write, revise, edit, and proofread it. Elise thinks that this method would leave her doing a disproportionate share of the work. Moreover, scheduling the work would be difficult, since she wouldn't know how good their research was until the last minute.

2. Because of their class and work schedules, Lars and Andrea want to hold team meetings from 8 to 10 pm, working later if need be. But Juan's wife works the evening shift, and he needs to be home with his children, two of whom have to be in bed before 8. He wants to meet from 8 to 10 am, but the others don't want to meet that early.

3. Lynn wants to divide up the work exactly equally, with firm due dates. Marcia is trying to get into medical school. She says she'd rather do the lion's share of the work so that she knows it's good.

4. Jessie's father is terminally ill. This team isn't very important in terms of what's going on in her life, and she knows she may have to miss some team meetings.

5. Sherry is aware that she is the person on her team who always points out the logical flaws in arguments: she's the one who reminds the team that they haven't done all the parts of the assignment. She doesn't want her team to turn in a flawed product, but she wonders whether the other team members see her as too critical.

6. Jim's team missed several questions on their team quiz. Talking to Tae-Suk after class, Jim learns that Tae-Suk knew all the answers. "Why didn't you say anything?" Jim asks angrily. Tae-Suk responds quietly, "Todd said that he

knew the answers. I did not want to argue with him. We have to work together, and I do not want anyone to lose face."

<u>Recommending a Policy on Student Entrepreneurs</u>

Assume that your small team comprises the officers in student government on your campus. You receive this e-mail from the Dean of Students:

As you know, campus policy says that no student may use campus resources to conduct business-related activities. Students can't conduct business out of dorm rooms or use university e-mail addresses for business. They can't post business web pages on the university server.

On the other hand, a survey conducted by the Kauffman Center for Entrepreneurial Leadership showed that 7 out of 10 teens want to become entrepreneurs.

Should campus policy be changed to allow students to use dorm rooms and university e-mail addresses for business? (And then what happens when roommates complain and our network can't carry the increased e-mail traffic?) Please recommend what support (if any) should be given to student entrepreneurs.

Your team will be writing a report recommending what (if anything) your campus should do for student entrepreneurs and supporting your recommendation.

Hints:

■ Does your campus offer other support for entrepreneurs (courses, a business plan competition, a startup
incubator)? What should be added or expanded?

■ Is it realistic to ask alumni for money to fund student start-ups?

■ Are campus dorms, e-mail, phone, and delivery services funded by tax dollars? If your school is a public institution, do state or local laws limit business use?

You need to

■ Send e-mail messages to team members describing your initial point of view on the issue and discussing the various options.

■ Help your team write the report.

■ Write a memo to your instructor telling how satisfied you are with

■ The decision your team reached.

■ The process you used to reach it.

■ The document your team produced

Recommending a Fair Way to Assign Work around the Holidays

Assume that your team comprises a hospital's Labor-Management Committee. This e-mail arrives from the hospital administrator:

Subject: Allocating Holiday Hours

It's that time of year again, and we're starting to get requests for time off from every department. We have shifts where every physician and half the nurses want time off. Don't these people realize that we can't close down over a holiday? And what's worse is that some of the shift leads are giving preferential treatment to their friends. The head of the nurses' union has already started complaining to me.

We need a comprehensive, hospital-wide procedure for assigning holiday vacation time that doesn't make us shut down wards. It needs to be flexible, because people like to take a week off around Christmas. But we have to set limits: no more than one-quarter of the staff can take time off at any one time. And those nurses like to swap shifts with each other to arrange their days off into larger blocks, so we need to cover that too.

Write up a policy to keep these people in line. Be sure to throw in the safety concerns and regulatory stuff.

Your team will be performing these tasks:

a. Write a team response recommending a new policy and supporting your recommendations. Include two transmittal e-mails: one to the hospital administrator, and one to the hospital's medical and nursing staff. Take care to address the two audiences' different needs and expectations with good you-attitude and positive emphasis.

b. Create a one-page notice describing your new policy. This notice should be suitable for posting at the duty desk for each ward: that is, in full view of both your employees and your customers (the patients). Create an effective visual design that emphasizes and organizes the text.

You personally need to

- Send e-mail messages to team members describing your initial point of view on the issue and discussing the various options.
- Help your team write the documents.
- Write a memo to your instructor telling how satisfied you are with
- The decisions your team reached.
- The process you used to reach them.

■ The documents your team produced.

Recommending a Dress Policy

Assume that your small team comprises your organization's Labor-Management Committee This e-mail arrives from the CEO:

In the last 10 years, we became increasingly casual. But changed circumstances seem to call for more formality. Is it time to reinstate a dress policy? If so, what should it be? Your team will be writing a response recommending the appropriate dress for employees and supporting your recommendation.

Hint:

Agree on an office, factory, store, or other workplace to use for this problem.

You need to

■ Send e-mail messages to team members describing your initial point of view on the issue and discussing the various options.

■ Help your team write the response.

■ Write a memo to your instructor telling how satisfied you are with

■ The decision your team reached.

■ The process you used to reach it.

■ The document your team produced.