Professional Sales Communication

PROFESSIONAL SALES COMMUNICATION

LINDA MACDONALD AND ADAPTED BY NSCC

NSCC

Nova Scotia

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INTRODUCTION: EFFECTIVE BUSINESS COMMUNICATION

UNIVERSITY OF MINNESOTA LIBRARIES PUBLISHING AND LINDA MACDONALD

Communication is an activity, a skill, and an art that incorporates lessons learned across a wide spectrum of human knowledge. Learning to communicate well requires you to read and study how others have expressed themselves, then adapt what you have learned to your present task—whether it is texting a brief message to a friend, presenting your qualifications in a job interview, or writing a business report. You come to this text with skills and an understanding that will provide a valuable foundation as you explore the communication process.

Effective communication takes preparation, practice, and persistence. There are many ways to learn communication skills; the school of experience, or "hard knocks," is one of them. But in the business environment, a "knock" (or lesson learned) may come at the expense of your credibility through a blown presentation to a client. The classroom environment, with a compilation of information and resources such as this text, can offer you a trial run where you get to try out new ideas and skills before you have to use them to communicate effectively to make a sale or form a new partnership. Listening to others may help you reflect on new ways to present, or perceive, thoughts, ideas and concepts.

With time, training, and practice, your skills and confidence in communication for business will improve, opening more doors than you might anticipate and furthering your career.

PART 1: DEVELOPING BUSINESS RELATIONSHIPS

1.0 DEVELOPING BUSINESS RELATIONSHIPS

UNIVERSITY OF MINNESOTA LIBRARIES PUBLISHING; LINDA MACDONALD; AND KAYLER MUTYABULE

Successful business communication, like successful business, requires strategic and deliberate decision-making. The better you are at making these decisions, the more effective you will be.

With all the options available to you, how do you determine what approach to take to communicate successfully with colleagues, customers, clients, suppliers, or supervisors? How do you select the level of formality in your writing, design features, or channels of communication? The number of options is seemingly endless. Where should you even begin?

In the classical tradition, the art of public speaking is called rhetoric, and the circumstances in which you give your speech or presentation are the rhetorical situation. By understanding the rhetorical situation for your presentation or written piece, you can gauge the best ways to reach your audience. Your viewpoint will shift to that of your audience members. By looking to your audience, you shift your attention from an internal focus (you) to an external (them/others) emphasis. This "other-orientation" is key to your success as an effective business communicator.

The first chapter in Part 1 discusses the importance of effective communication for you and your organization. The second chapter addresses your responsibilities as a business communicator. Because your positionality affects the way you see the world and others, the third chapter focuses on your personal and social identity. You will then start developing your strategy in a message by focusing on the communication's context, purpose, audience, form, and possible channels for your messages as well as the inclusive language that defines an ethical communicator.

PART 1 LEARNING OBJECTIVES

- Explain the benefits of effective communication for you and your workplaces,
- Outline the responsibilities of an ethical business communicator,
- Identify aspects of your personal and social identity that may influence your views of the audience and of business,
- Describe the context of a communication and its impact on delivery and channel,
- Determine the purpose of your messages and clarify what you hope the message will achieve,
- Identify the primary and secondary audiences and assess these audiences' needs,
- Select the most appropriate channel and form for your message based on the purpose and audience, and
- Explain the importance of inclusive language for building business relationships.

1.1 THE IMPORTANCE OF COMMUNICATION

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVE

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

- Explain the benefits of effective communication for you and your workplaces

Communication is key to your success—in relationships, in the workplace, as a citizen of your country, and throughout your lifetime.

Business communication is essentially a problem-solving activity. Communicators address the following questions:

- What is the situation?
- What are some possible communication strategies?
- What is the best course of action?
- What is the best way to design the chosen message?
- What is the best way to deliver the message?

In this book, you will use this problem-solving process as you apply business communication strategies to the challenges you will encounter in the workplace. Communicating effectively is important for developing and maintaining relationships, for representing you and your employer professionally, and for moving forward in your career.

COMMUNICATION INFLUENCES YOUR THINKING ABOUT YOURSELF AND OTHERS

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

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

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

Your communications skills also help you to understand others. Their words, tone of voice, nonverbal gestures, or the format of their written documents provide you with clues about who they are and what their values and priorities may be. Active listening and reading are also part of being a successful communicator.

COMMUNICATION INFLUENCES HOW YOU LEARN

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

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

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

Communication Represents You and Your Employer

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

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

Communication Skills Are Desired by Business and Industry

Employers seek employees who are proficient in human (or "soft") skills. Zety (Buffet, 2021) asked employers whether "hard" skills or "soft" skills are more important. Hard skills are skills developed through formal education and training and include technical skills, computer skills and language skills. Buffet defines soft skills as "transferable skills that are mainly related to the way you work with other people. They include social skills, communication skills, emotional skills, and people skills" (para. 6). Most employers (61%) ranked soft skills as more important. Your ability to communicate with colleagues, supervisors, and customers is a valuable asset.

The Toronto Financial Services Alliance's report *Unlocking the Human Opportunity: Future-proof Skills to Move Financial Services Forward* (PwC, 2018) looks at the skills critical for the financial industry sector's success. The report focuses on financial institutions in Toronto. Leaders in the financial sector identify "the ability to understand and deliver meaningful value to customers" (p. 8) as critical for everyone in the organization. Because information about finance is available online, customers stay with financial institutions because of "the quality of their experience and how they feel after each interaction" (p. 12). Online interactions provide digital self-services while human to human interactions address more complex issues. The report confirms that future talent must have the ability to understand, communicate with, empathize with, and influence others. Although online activity and automation have increased the number of contacts with financial institutions, human connections through meaningful interaction create a personalized experience and value for the organization.

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

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=23#h5p-1

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1.2 THE RESPONSIBILITIES OF BUSINESS COMMUNICATORS

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVES

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

- Explain the responsibilities you have to your audience, employer, and profession to be prepared
- Outline the responsibilities of an ethical business communicator

SELF-ASSESSMENT

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=26#h5p-2

What did your self-assessment reveal about your habits? Students typically don't think of themselves as business professionals, yet as co-op students you will soon enter a workplace that expects you to adhere to industry performance standards. If you scored seven or above, you are on your way to meeting your future employers' expectations of your communication behaviours. If you scored six or below, you may need to change your behaviours to meet the expectations of your employers, colleagues, and clients.

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

BE PREPARED

As the business communicator's first responsibility, preparation includes being organized, communicating clearly, and being concise and punctual.

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

The Prepared Communicator Is Organized

Part of being prepared is being organized. Aristotle called this *logos*, or logic, and it includes the steps or points that lead your communication to a conclusion. Once you've invested time in researching your topic, you will want to narrow your focus to a few key points and consider how you'll present them.

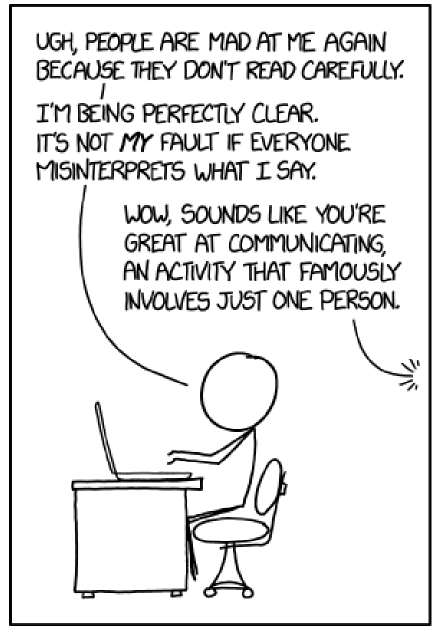
You also need to consider how to link your main points together for your audience. Use transitions to provide signposts or cues for your audience to follow along. "Now that we've examined X, let's consider Y" is a transitional statement that provides a cue that you are moving from topic to topic. Your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

The Prepared Communicator Is Clear

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

You need to have a clear idea in your mind of what you want to say before you can say it clearly to someone else. Decide what the single most important point is that you wish to make and how you want the audience to think or feel when they see or hear it. Clarity also involves considering your audience; you will want to choose words and phrases they understand and avoid jargon or slang that may be unfamiliar to them.

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



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

The Prepared Communicator Is Concise and Punctual

Good business communication does not waste words or time. Concise means brief and to the point. In most business communications you are expected to get to the point right away. Being prepared includes being able to state your points clearly and supporting them with evidence in a relatively straightforward, linear way.

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

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

There is one possible exception to this principle. Many non-Western cultures prefer a less direct approach and begin interactions with social or general comments that a Canadian or American audience might consider unnecessary. Some cultures also have a less strict interpretation of time schedules and punctuality. Different cultures have different expectations, and you may need to adapt the level of directness to audience needs.

BE ETHICAL

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

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

The Ethical Communicator Is Egalitarian

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

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

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

The Ethical Communicator Is Respectful

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

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

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

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

The Ethical Communicator Is Trustworthy

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

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

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

Being worthy of trust is something you earn with an audience. Many wise people have observed that trust is hard to build but easy to lose. A communicator may be asked a question, not know the answer, and still be trustworthy, but it's a violation of trust to pretend you know something when you don't.

WORDS AND YOUR LEGAL RESPONSIBILITY

Your writing in a business context means that you represent yourself and your company. What you write and how you write it can be part of your company's success, but can also expose it to unintended consequences and legal responsibility. When you write, keep in mind that your words will keep on existing long after you have moved on to other projects. They can become an issue if they exaggerate, state false claims, or defame a person or legal entity such as a competing company. Another issue is plagiarism, using someone else's writing without giving credit to the source. Whether the material is taken from a printed book, a Web site, or a blog, plagiarism is a violation of copyright law and may also violate your company policies. Industry standards often have legal aspects that must be respected.

Libel is the written form of defamation, or a false statement that damages a reputation. If a false statement of fact that concerns and harms the person defamed is published—including publication in a digital or online environment—the author of that statement may be sued for libel. If the person defamed is a public figure, they must prove malice or the intention to do harm, but if the victim is a private person, libel applies even if the offense cannot be proven to be malicious. You have a right to express your opinion, but the words you use and how you use them, including the context, are relevant to their interpretation as opinion versus fact. Always be careful to qualify what you write and to do no harm.

The "Golden Rule"

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

CHECK YOUR KNOWLEDGE

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DISCUSSION QUESTIONS

1. Have you worked with a manager or team leader who was "prepared" in the ways described in this chapter? What did this manager *do* that demonstrated this preparation? Have you worked with someone who *lacked* this preparation? How was this lack of preparation exhibited?
2. What are the characteristics of the ethical communicator? Provide an example from your experience of a communicator who failed to apply these principles in communicating with you verbally or in writing.
3. What are specific techniques you can use to demonstrate egalitarianism, respectfulness, and trustworthiness in a presentation? In written documents?

1.3 PERSONAL VALUES AND SOCIAL IDENTITY

LEARNING OBJECTIVES

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

- Identify and prioritize personal core values
- Consider the cultural context from which these values developed
- Explain the importance of defining your social identity
- Define intersectionality

Relationships are key to business success. To collaborate effectively with team members, to establish trust with clients, to bring innovative ideas to new partners, and to meet expectations of management, it is essential to develop and maintain relationships. These relationships depend on shared personal and corporate values and on respectful engagement where there are differing values.

When you write a cover letter in application for a co-op position or summer job, you will aim to demonstrate your fit with the organization. Employers do not want employees who possess only technical and knowledge skills; they seek employees who can fit with and further the culture and values of the organization. This need for fit does not mean that you should pretend to be something you are not. You will not be happy in an organization with values that contradict your core personal values. Furthermore, your personal value set is unique to you. You will not be an exact fit with the values of any other person or any organization. Your differences contribute to diversity. Diversity is also a key element of business growth. Your prioritization of values and your ability to respect and appreciate the values of others are key.

We have probably all been told "Just be yourself". What does that even mean? The word "just" makes it seem so simple. And "yourself"? What actions are displayed that hold this "self"? What is done or is not done that indicates that I am being "myself"?

You are "yourself" when your actions are aligned with your core values.

Core values are your foundational beliefs and attitudes. They guide an individual or organization's decisions, behaviours, communications, and actions. Your core values define who you are and guide the choices you make and the things you do. As Susan Heathfield writes, core values "represent an individual's or an organization's highest priorities, deeply held beliefs, and core, fundamental driving forces. They are the heart of what your organization and its employees stand for in the world" (para. 1).

Although co-op education programs often focus work readiness, you will not be adequately prepared for your world without self-knowledge. To be an effective business communicator, you need to understand the values that govern your own behaviours as well as understand the values that guide those with whom you are communicating. In addition, understanding our social identities and how these identities have influenced our values, experiences, and opportunities can help us develop mutually respectful relationships.

PERSONAL VALUES

In her book *Presence*, Amy Cuddy describes what she calls *presence.* Presence is "the state of being attuned to and able to comfortably express our true thoughts, feelings, values, and potential" (p. 24). Displaying presence results in appearing more authentic, believable, and genuine.

You can only be truly present, truly yourself, if your words and actions are aligned with your current values. Being clear with what these values are can help you achieve presence. The values you prioritize today may not be the ones you prioritize as you progress in age and in your career and family life. For example, you may prioritize adventure and friendship now but, because of life events, prioritize community and family in five years. Working in alignment with your values, even as they change, is important for personal and professional success.

EXERCISE: PERSONAL IDENTITY WORKSHEET

Work through Steps 1-3 of the Core Values Clarification Exercise adapted from the University of Wisconsin-Madison. Share your list of eight core values with your peers to identify shared values and interesting differences. Spend a few minutes discussing how you developed these personal values. What experiences or environments contributed to the strength of these values for you?

SOCIAL IDENTITY

Navigating the gap between your values and the values of others requires awareness and sensitivity. Firstly, we need to be aware that our personal identities are influenced by our social identities.

As humans, we are driven to seek connections and to understand our place in society. If you are a first-year Commerce student at Dalhousie University, your social identity may be defined by your year in school, degree program, and university. Your membership in these groups may lead you to align yourself with other first-year students in the residence hall, to take pride in and ownership of the Management Building, and to wear black and gold as you cheer for the Tigers at sports events and celebrate at a particular pub. Your social affiliations define both who you are and who you are not.

You may think of your status as a Dal Commerce student as better than that of an Arts and Sciences student or better than that of a student who attends the university down the road. The distinction between you and the student at a neighboring university is arbitrary yet can prompt strong emotions of pride and competitiveness.

In addition to identifying with your year, program, and university, you may belong to other groups (either by choice or by birth) based on your hometown, preferred hockey team, native language, religious preferences, racial identity, gender, or sexual orientation.

Henri Tajifel and John Turner defined social identity theory in the 1970s. Social identity results from a process of social categorization, social identification, and social comparison. **Social categorization** is "the process by which we organize individuals into social groups in order to understand our social world". According to Vinney, "we tend to define people based on their social categories more often than their individual characteristics" (Vinney, 2019, para. 7). **Social identification** is the process of identifying as a member of the in-group and taking on the group's characteristics. Our identification with the group leads to emotional investment in the group's success, which then contributes to our self-esteem. **Social comparison** is the process of comparing the in-group to other groups, or out-groups.

To learn more about social identity theory, watch this video 13-minute video:

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=31#oembed-1

(Direct link to Us vs. Them: The Science of Social Identity Theory video)

Whether we selected a group or were born into it, our membership in the group comes with certain benefits. For example, as a student you have access to resources and library materials that people who do not belong to the university cannot as readily access. If you are a native speaker of English, you speak naturally and do not have to think about how to respond to a question in a grammatically acceptable way. If you are white, you likely find it easy to buy make-up that matches your skin tone or magazines that include images of people who look like you.

Our social identities also come with disadvantages. You may have the advantage of a strong network within the 2+LGBTQ community, but still face social stigma in places that lack gender-neutral restrooms. You may feel pride in your country of origin but frightened by anti-Asian racism. You may feel a strong sense of community within the Muslim community but feel judged and avoided in a classroom in which you are the only one wearing a hijab.

Bridging social categories will help you understand the advantages and disadvantages others experience. Peter Mandeno's company Wok + Wine offers events designed to foster new or enhanced relationships. By joining people, wine, and shrimp around a table covered with banana leaves, he creates an environment that leads to connections and collaborations. The messiness of peeling shrimp leads to more openness and authenticity in the interactions. Wok + Wine identifies several benefits of these events, including better relationships between team members, a greater sense of belonging, and collaborations that lead to innovative ideas. In moving outside the groups with which they have strong social identities, people discover new approaches to complex problems and creative solutions. As a *Harvard Business Review* article points out, Wok + Wine's approach has, then, both economic and intellectual incentives.

Creating a social identity wheel in the activity below can help you think through your various social identities and the advantages and disadvantages that come with them. Sharing your findings can help you find common ground as well as identify differences. These differences can lead to new ways of seeing, understanding, and respecting the perspectives of others.

EXERCISE: STARBURST IDENTITY CHART

1. Complete the Starburst Identity Chart (Appendix A). In completing your chart, you might consider your

- cultural background,
- first language,
- marital status,
- age,
- learning ability,
- social class and socioeconomic status,
- religion,
- ethnicity,
- sexual orientation,
- gender,
- citizenship,
- physical abilities, or
- any social category that contributes to your identity.

2.Discuss:

(a) Which identities most influence your view of yourself? Which identities do you think most affect the way others see you?

(b) What are the advantages and disadvantages of membership in each group?

(c) In what ways does your social identity with one group conflict with your social identity with another group? For example, a dual citizen might identify with the country they are living in and join with the majority of that group in condemning the actions of their home country, a country with which the person also closely identifies. How does this conflict affect your communications?

INTERSECTIONALITY


Kimberlé Crenshaw

Kimberlé Crenshaw, pictured on the right, tells the story of Emma DeGraffenreid and four other women who sued General Motors in 1976 for racial and gender discrimination. Prior to the US Civil Rights Act of 1964, the company had hired white women in secretarial positions and Black men in factory positions. Black women were hired after 1970, but they were unable to keep their jobs during layoffs due to the company's "last hired/first fired" policy. Discriminatory practices prevented them from attaining seniority. Because both Blacks and women were employed by the company and had opportunity to advance, the court found that General Motors was not, therefore, discriminating against women, nor were they discriminating against Blacks. In her 2016 TED Talk, Crenshaw discusses the failure of the court to see the discrimination that Black women faced as a result of being both Black and female. The women lost their case.

Crenshaw (1989) coined the term "intersectionality" to refer to the ways in which DeGraffenreid and the other women who sued GM experienced a combination of racial and gender discrimination. Today, the term "intersectionality" refers to a broad range of overlapping social identities that experience discrimination.

Understanding intersectionality can help you in identifying the needs, expectations, and perspectives of your audience. As the Government of Canada's (n.d.) "Introduction to Intersectionality" states,

> It is essential to recognize that people have multiple and diverse identity factors that intersect to shape their perspectives, ideologies and experiences. For example, consider the multiple identity factors of an immigrant man with a disability. Rather than isolating the experience of being an immigrant from that of being a man from that of being a person with a disability, adopting an intersectional approach will enable you to see this individual as a whole being, with multiple identity factors.

This video explains the complexity of intersectionality. Awareness of these complexities can help in understanding the experiences of our colleagues, customers, and other stakeholders in a business environment.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=31#oembed-2

(Direct link to [What is Intersectionality and Why is it Important?](#) video)

CONCLUSION

Your personal values and your social identities create the unique person that you are. Clarity on these identities will help in presenting your personal brand effectively to employers, in establishing common ground with team members, and in understanding and connecting with customers or clients.

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Media Attributions

1.4 CONSIDER THE CONTEXT

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVE

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

- Determine the context for a message.

To create an effective message, whether oral or written, you will need to assess several factors including the context for the message, the intended purpose of the message, the primary and secondary audiences, and the most appropriate channel. Chapters 1.4 through 1.7 address these factors.

The context is the situation in which the audience will receive the message. The context includes the space in which the message is delivered or received, the timing of the message, and the external events or cultural environment that might affect the audience reaction to the message.

The **space** in which the audience receives the message may influence their reaction. If you are going to be presenting a speech in class, your context will be the familiar space of your classroom or online environment. If you are writing an email to a new client, your context will be the email form and format. Other contexts might include a business conference room, a restaurant where you are the featured speaker for a dinner meeting, or a podium that has been set up outdoors for a sports award ceremony.

The **time** of your speech will relate to people's natural patterns of behavior. If you give a speech right after lunch, you can expect people to be a bit sleepy. Knowing this, you can take steps to counter this element of the context by making your presentation especially dynamic, such as having your audience get up from their seats or calling on them to answer questions at various points in your speech. If you send an email to a small business near closing time, your message may not receive the full attention of your audience as they work to close out the cash registers and restock inventory.

You may also need to consider your topic within the **cultural context**. As business communicators, you will need to be aware of the potential impact of social change on audience expectations of content and language. The larger context may affect how your readers will use, apply, or accept your information. If you are presenting a speech on the importance of affordable housing in October of an election year, your audience may be aware of the debates about this issue in the media and may have strong emotions about it. If you are writing a report on commercial lobster fisheries in Atlantic Canada and fail to include Sipekne'katik fishers claim to a moderate livelihood, your audience may interpret this as insensitivity or cultural bias.

WRITING EXERCISE

Apply the information from the reading to the following scenario. You will continue working with this scenario in the following three chapters:

> You have been hired for a co-op position in your field with your ideal employer. You are starting your co-op during the busy season.
>
> Your supervisor has asked you to write an email introducing yourself to the other members of your department.

In preparing to write this email, identify **three** aspects of the context that influence your strategy in communication. If you are not familiar with the organization, visit their website to get a general sense of what this organization's mission and values are (look for the About Us page).

Photo: "Busy people" by leonwpp is licensed under CC BY-NC-SA 2.0

1.5 DETERMINE YOUR PURPOSE

LINDA MACDONALD AND [AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER]

LEARNING OBJECTIVE

By the end of this chapter, you should be able to

- Identify the purpose of your messages and clarify what you hope the message will achieve, and
- Apply your understanding of purpose in a written document or presentation.

Before you develop your communication strategy, determine what information must be communicated and why.

If, for example, you need to obtain information regarding progress on a new mobile app, you need to clarify exactly what information you want. Do you need the names of the people involved in the development, or a timeline for coordination with human resources, or are you collecting demographic information from the Marketing Department?

You also need to determine what you want the recipient to do in response to the message. Should the recipient arrange a meeting to discuss the app? Email a progress report? Respond immediately in person? Clarifying exactly what the sender wants and what the recipient should do focuses the message, facilitates the flow of work, and minimizes time spent on sending and receiving emails.

To develop your strategy, **describe your intended goal with an action verb**. Do you want to inform, persuade, introduce, update, or entertain? Is there some other action that best describes your general purpose? Most business messages are informational, but messages may have multiple purposes. For example, your email to a client may be to inform them of changes to their account, but your tone and language may be designed to build you and your bank's credibility.

In addition to its **general purpose** (e.g., to inform, persuade, entertain, or motivate), every piece of writing also has at least one **specific purpose** or intended outcome– what will happen once your communication has been read or heard. **Define what you want the audience to think, feel, or do** as a result of your message. What is it you hope to accomplish? For example, you may be writing an email to a renter informing them that the building's laundry facilities will be closed on Wednesday so that upgraded machines can be installed. You want this audience to accept the message despite the inconvenience. You also want them to feel pleased with the improvement to the housing unit.

A cover letter in application for a co-op or internship position has multiple general and specific purposes, making writing them a particularly challenging task to write. The résumé primarily satisfies the purpose of informing your audience of your key skills and attributes, and your cover letter will confirm this information. When you write a cover letter, your primary **general** goal is to *persuade* the reader.

Your cover letter will have several **specific** purposes. Your goal is to make the audience feel confident in your ability to do the job, recognize your professionalism and credibility, and act on moving you forward in the hiring process to the interview. Defining your general purpose as persuasive rather than informative shifts your perspective from "I", in an informational discussion of your skill set and experience, to "you" as you write to persuade the reader that you satisfy the organization's needs and bring value to the company.

WRITING EXERCISE

Apply the information from the reading to the following scenario. You will continue working with this scenario in the following three chapters:

> You have been hired for a co-op position in your field with your ideal employer. You are starting your co-op during the busy season.
>
> Your supervisor has asked you to write an email introducing yourself to the other members of your department.

In preparing to write this email, identify **one or two** general purposes or goals (use action verbs). Then identify at least **three** specific purposes (focus on what you want the audience to think, do, or feel).

1.6 PROFILE YOUR AUDIENCE

LINDA MACDONALD AND [AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER]

LEARNING OBJECTIVE

- Determine the primary and secondary audiences
- Identify these audiences' expectations and needs
- Apply your audience profile in creating a message

IDENTIFYING YOUR AUDIENCE

The clipart above demonstrates what happens when a presenter or writer neglects the audience's needs and fails to meet audience expectations. The audience is disinterested, bored, angry, and frustrated.

In business communication, the audience is critically important. To meet a customer's needs, you need to know who they are — their likes and dislikes, their understanding of your product or service, and what they want from the purchased product. To establish positive working relationships with your supervisors and colleagues, you need to understand their expectations of professional behaviour and their preferred channels of communication. These three audiences– customers, colleagues, and supervisors – each require a different strategy in your communication.

Your understanding of the audience is made even more complex by social change. Business communicators have to be especially attuned to shifting audiences and audience expectations. For example, just a few years ago it would have been considered grammatically incorrect to use "they" to refer to a singular person; we no longer accept the binary terms of "he" and "she", and the singular "they" is now preferred. Businesses need to both adapt to and lead these changes in language to meet expectations.

The capitalization of the word "black" in reference to race is also undergoing change. As John Eligon's article in *The New York Times* points out, hundreds of news organizations have adopted the use of "Black", but the movement has not been accepted by all members of the Black community. The issue has "unleashed a deep debate over identity, race, and power" (Eligon, 2020). Business communicators will need to determine how this debate impacts business relationships. Your communications reflect and anticipate your audiences' needs and, in the interest of social good, may contribute to a shift in expectations.

FAILING TO CONNECT

Failing to properly identify the audience and their needs and expectations can have terrible consequences for businesses.

In 2017, a United customer was asked to leave a plane to make room for airline staff. In a message to employees, CEO Oscar Munoz commended his staff for "politely" asking the passenger to leave and for “going above and beyond.” He referred to the passenger as “belligerent” and “disruptive” (Zhang, 2017). The message to the United team went public– as did the video linked below.

Click here for video link. United Airline passenger removed from the plane

In addition to failing to gather all the information before making a statement, Munoz failed to consider his audience, which included not only his employees but his customers and the media. Munoz did not consider what effect his words would have on these audiences. Because the customers clearly impact the company’s success, they should have been considered a primary, or decision-making, audience.

Fragrance company Dior has also demonstrated a lack of awareness of the audience. As the video linked below shows, the ad for Sauvage angered Indigenous groups and their allies. The company did not consider the demographics of their primary and secondary audiences.

Click here for video link. CBC: Dior Pulls Ad for Sauvage Perfume Amid Criticism over Indigenous Imagery

Financial institutions also must understand their audiences. Customer complaints about banks up-selling, reinforced by revelations from bank employees, have threatened to undermine banks’ relationship with their audience. As CBC news business analyst Don Pitts writes, “Trust is a bank’s fundamental asset.” If banks do not understand their audience’s expectations of the industry, they risk losing them.

This message from a student also reveals a lack of understanding of audience: “Hey, prof, I wont be in class bc of an interview, let me knw if I miss anything. can I use you as a refrence?” The student writer damages the relationship with the instructor through a lack of professionalism. The message, with its abbreviated words and missing letters, looks more like a text message to a friend than an email to a professor. The message puts the burden on the recipient to let the student know “if” they missed anything and follows that with a request for a favour. The message fails to convince the reader to support the student in entering the professional realm.

To understand the audience, their needs, and their expectations, profile your target audience. You will have an incomplete picture of your audience’s personal values and social identity, but you will likely know many things about them. For example, this book is written for a target audience of first-year Commerce students. I cannot possibly predict your race, ethnicity, or sexual orientation, but I know that my readers are from diverse backgrounds and can estimate, based on enrollment, that 25-30% are international. My target audience likely has at least a high school diploma. With this educational background, most readers will have some experience with academic writing and limited experience writing for business. Because they have grown up with access to Internet, they likely prefer messages to be written in a sans serif font like Calibri and prefer visual messages over text :). I can predict a great deal more based on average age and choice of academic program, but I also have to consider that there may be mature students, students who did not grow up with the Internet, home-schooled students, and students who would not have chosen Commerce were it not for parental pressure. Nonetheless, having a basic understanding helps me be more strategic in crafting my message.

PROFILING YOUR AUDIENCE

To understand your audience, answer a series of questions:

- **Who is your primary audience**? The primary target is the decision maker(s), the person or persons that will act on the information you deliver. In a job interview, the selection committee is the primary audience.
- **Who is your secondary audience**? The secondary audience may not make the final decision, but they may influence the decision. For example, the selection committee may ultimately decide which candidate is right for the position, but the receptionist may influence the decision based on the interactions with the candidate.
- **What do you know about the audience**? First, consider your relationship with the audience and their relationships with each other. For example, are they strangers to you and each other? Are they workmates who share common knowledge? Also consider their position in the organization and their experience, age, culture, language, education– anything that might affect your audience's view of your message. If, for example, you are writing to an older audience of business leaders, your message may be formal in language and tone, but if you are trying to convince younger first-year students to join your society, a more casual approach would be appropriate.
- **How much does your audience know about the topic**? Consider how much your audience knows or needs to know. In writing your stock performance report for a new investor, you will need to explain why you are using the TSX as a benchmark for your evaluation of the stock performance. When you write the progress report to your supervisor, a financial analyst, you will not need to add this explanation.
- **What are the audience's preferences and expectations**? You will not always know your audience's preferences, but you can often make educated guesses. If you are writing a professor to ask for a recommendation, your email will need to include information about the job you are applying for and a copy of your resume. The email will also maintain a formal tone in a politely-worded request to meet your audience's expectations of professional behaviour.
- **How is the audience likely to react to your message**? Audiences may react positively to your message; other audiences may be more ambivalent; others may react with anger or hostility. Predicting their reaction helps craft your message. If you know that a customer will be unhappy that you cannot replace a broken part, you can plan in advance to mitigate dissatisfaction by offering an alternative.

Successful businesses, employees, and students anticipate audience needs and expectations. Lululemon uses social media, advertising, and brand ambassadors to satisfy the needs of a young audience that identifies with the lifestyle the company promotes. Lift & Co. uses inventive names for board rooms because "they make an office seem more enjoyable and employees feel the time spent there is less of a chore." These companies know their audiences, and this knowledge brings success.

WRITING EXERCISE

Apply the information from the reading to the following scenario. You will continue working with this scenario in the following three chapters:

> You have been hired for a co-op position in your field with your ideal employer. You are starting your co-op during the busy season.
>
> Your supervisor has asked you to write an email introducing yourself to the other members of your department.

In preparing to write this email, answer the six profile questions above. If you are not familiar with the organization, visit their website to get a general sense of what this organization's mission and values are (look for the About Us page).

1.7 SELECT A CHANNEL OF COMMUNICATION

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVE

- Select the most appropriate channel and form for your message based on the purpose and audience.
- Define media richness
- Review individual rights to privacy in workplace communications

Purpose is closely associated with channel. Given the purpose and the audience, you will then select the best channel of communication.

Would the message best be delivered in person because of its sensitivity, its complexity, or the need to address questions quickly? Is a text message sufficient? Or is an email more appropriate? So that readers can maintain file records, is an attached report more desirable?

Your decision should consider the audience's preferences, the organization's needs, the complexity of the message, and the need for "media richness".

FEATURES OF VARIOUS CHANNELS

When is it appropriate to send an instant message (IM) or text message versus a conventional e-mail or fax? When is it best to deliver a message in person in a speech or meeting? Would the message best be delivered in person because of its sensitivity, its complexity, or the need to address questions quickly? Or is an email more appropriate? So that readers can maintain file records, is an attached report more desirable?

Each channel has features that make it appropriate or inappropriate in certain situations. Each has its own strengths, weaknesses, and understood expectations as summarized in Table 1.7.1.

TABLE 1.7.1 COMMUNICATION CHANNELS

Channel	Strengths	Weaknesses	Expectations	When to Choose
Face-to-Face	• Non-verbal communication enhances the message • Good for rapid exchanges of information • Provides immediate feedback	• No record of interaction on file and no ability to edit the message • Not suitable for large amounts of information	Quick response	• You need to express emotion in delivering sensitive information • When interaction and dialogue are preferable

IM or Text Message	• Very fast • Good for rapid exchanges of small amounts of information • Inexpensive	• Informal • Not suitable for large amounts of information • Abbreviations lead to misunderstandings	Quick response	• Informal use among peers at similar levels within an organization • You need a fast, inexpensive connection with a colleague over a small issue and limited amount of information
E-mail	• Fast • Good for relatively fast exchanges of information • "Subject" line specifies project for record-keeping • Easy to distribute to multiple recipients • Inexpensive	• May hit "send" prematurely • May be overlooked or deleted without being read • "Reply to all" error • "Forward" error • Large attachments may cause the e-mail to be caught in recipient's spam filter	Normally a response is expected within 24 hours, although norms vary by situation and organizational culture	• You need to communicate but do not need an immediate reply • You need to send attachments (provided their file size is not too big)
Fax	• Fast • Provides documentation	• Receiving issues (e.g., the receiving machine may be out of paper or toner) • Long distance telephone charges apply • Rarely used telephone-based technology; losing popularity to online information exchange	Normally, a long (multiple page) fax is not expected	• You want to send a document whose format must remain intact as presented, such as a medical prescription or a signed work order • Allows use of letterhead to represent your company
Memo	• Official but less formal than a letter • Clearly shows who sent it, when, and to whom	• Memos sent through e-mails can get deleted without review • Attachments can get removed by spam filters	Normally used internally in an organization to communicate directives from management on policy and procedure, or documentation	You need to communicate a general message within an organization

IM or Text Message	• Very fast • Good for rapid exchanges of small amounts of information • Inexpensive	• Informal • Not suitable for large amounts of information • Abbreviations lead to misunderstandings	Quick response	• Informal use among peers at similar levels within an organization • You need a fast, inexpensive connection with a colleague over a small issue and limited amount of information
Letter	• Formal • Letterhead represents your company and adds credibility	• May get filed or thrown away unread • Cost and time involved in printing, stuffing, sealing, affixing postage, and travel through the postal system	Specific formats associated with specific purposes	You need to inform, persuade, deliver bad news or negative message, and document the communication
Report	Significant time for preparation and production	Requires extensive research and documentation	Specific formats for specific purposes; generally reports are to inform but may also be to recommend	You need to document the relationship(s) between large amounts of data to inform an internal or external audience
Proposal	Significant time for preparation and production	Requires extensive research and documentation	Specific formats for specific purposes; generally, proposals are to persuade	You need to persuade an audience with complex arguments and data

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=43#h5p-4

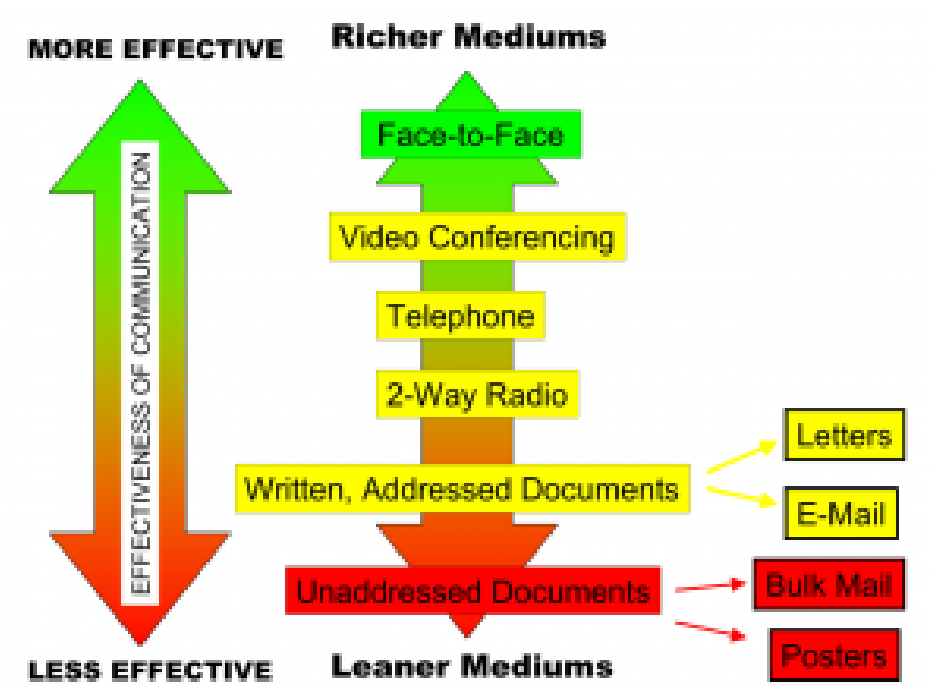
MEDIA RICHNESS

By choosing the correct channel for a message, you can increase the likelihood that your message will be understood and acted upon in the manner you intended.

Your decision should consider the audience's preferences, the organization's needs, the complexity of the message, and the need for "media richness". A phone call has less media richness than a Microsoft Teams or Zoom video call. The Teams video call adds visual elements that enhance the message. But a video conference usually lacks a full view of the speaker and all their non-verbal communications, and speakers often look at the listener's image rather than the camera when they speak. A face-to-face meeting has even greater media richness.

Three qualities determine a medium's richness:

- **multiple information cues simultaneously**: The richer the medium, the more cues. The addition of body language to speech adds cues.
- **speed of feedback**: Richer media have faster response times. Feedback is immediate in a verbal exchange but delayed or non-existent through the medium of a poster.
- **personal focus**: A letter addressed to a single recipient has more personal focus than a poster visible to many.
- **ability to use natural language.** A face-to-face medium provides an opportunity to use more natural language because body language supplements the oral communication, the speaker can tell more easily when additional explanations are necessary, and the speaker is able to adjust the formality of the language for the context.



Not all content should be delivered through a rich medium. Simple, routine messages only require a lean medium. A leaner medium is often the most efficient way to deliver content in business when the purpose is simply to inform the audience.

PRIVACY AND SECURITY OF ELECTRONIC COMMUNICATIONS

An employer has the right to view your electronic files stored on their network, to track you when using their equipment, and to view your company-provided social media or your personal but public posts. When you call and leave a voice message for a friend or colleague at work, do you know where your message is stored? There was a time when the message may have been stored on an analog cassette in an answering machine, or even on a small pink handwritten note which a secretary deposited in your friend's in-box. Today the "where" is irrelevant; the in-box is digital and can be accessed from almost anywhere on the planet. That also means the message you left, with the representation of your voice, can be forwarded via e-mail as an attachment to anyone. Any time you send an IM, text, or e-mail or leave a voice message, your message is stored on more than one server, and it can be intercepted or forwarded to persons other than the intended receiver. Are you ready for your message to be broadcast to the world? Do your words represent you and your business in a positive light?

Newsweek columnist Jennifer Ordoñez writes that it has become routine for employees to sign "the consent form attesting that you understand and accept that any e-mails you write, Internet sites you visit or business you conduct on your employer's computer network are subject to inspection" (Ordoñez, 2008, para. 1). As you use Instagram, update your Facebook page, get LinkedIn, Twitter, text, and IM, you leave an electronic trail of "bread crumbs" that merge personal and professional spheres, opening up significant issues of privacy. Anything you write or record in the workplace can be stored for later retrieval by people for whom your message was not initially intended.

Review any electronic communication before you send it. Spelling and grammatical errors will negatively impact your credibility. With written documents we often take time and care to get it right the first time, but the speed of IM, text, or e-mail often deletes this important review cycle of written works. Just because the message you prepare in IM is only one sentence long doesn't mean it can't be misunderstood or expose you to liability. Take time when preparing your written messages, and review your work before you click "send."

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=43#h5p-5

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1.8 INCLUSIVE LANGUAGE

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Explain how the ways we use language affects how we think
- Define the term "inclusive language"
- Identify examples of inclusive language in describing gender, race, and abilities and in naming practices

In 2018, the Canadian government legislated a change to the English version of the national anthem. The words "True patriot love in all thy sons command" were changed to "True patriot love in all of us command". This adoption of gender neutral language signals a change in Canadian society. The inclusive language shifts how people of all genders see themselves as Canadians as well as how others see them as fellow patriots.

As cultural standards change, the expectations for ethical uses of language change. To maintain effective relationships with your audience, your language should be free of prejudice or bias. Your written pieces and oral presentations should avoid any language that implies bias or that perpetuates negative views of people based on race, ethnicity, gender, sexual orientation, socioeconomic status, religion, age, or other characteristics like immigration status or physical or mental abilities.

For the audience, inclusive language demonstrates respect. It communicates that all people are included in the conversation. Non-inclusive language intentionally or unintentionally excludes, stigmatizes, or dismisses people. For the speaker or writer, inclusive language changes perspective with the consideration of another person's world view.

The 14-minute video linked below does not directly address inclusive language; rather, the video explains how our language reflects our world view. Before we move on to ways to make our language more inclusive, we first need to understand why it is so important to change our perspective through language use.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=45#oembed-1

(Direct link to How language shapes the way we think by Lera Boroditsky video)

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=45#h5p-6

In her TED Talk, Boroditsky asks us to consider why we think the way we do and how we might think differently. In using inclusive language, we open up our minds to a broader range of possibilities.

The following interactive presentation defines inclusive language and provides some examples of what to avoid and what to use to be more inclusive.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=45#h5p-7

Pronoun use has become increasingly important for establishing respectful relationships. A variety of pronouns in addition to *he*, *she*, and the singular *they* (*ze*, *sie/zie*, *ey*, *per*, and others) may be preferred by your audience, but the use of the singular *they* is the most commonly preferred gender neutral pronoun. If your audience uses an alternative, you should respect their identity preferences. The following presentation focuses on using non-binary pronouns.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=45#h5p-8

As a business communicator, you will need to be aware of how your language shapes how you view the world and the ways in which that view may exclude certain peoples or ways of being. Using inclusive language requires continuous learning and practice. Many business have adopted guidelines for inclusive language practices. Apple, for example, instructs employees to capitalize *Black* in reference to Black people or culture. Apple's general guidelines for writing include the following:

- **Think inclusively**. "As you write, think about your potential audience, and try to imagine your content from their perspective…" (Apple Style Guide, 2021, para. 1).
- **Research words**. Apple recommends researching the history of words to determine whether or not to use them.
- **Avoid terms that are violent, oppressive, or ableist**. Apple no longer uses the term *master* to refer to a primary device.
- **Avoid idioms and colloquial expressions.** Apple instructs employees to use language that is accessible to people learning English.
- **Don't use colour to convey positive or negative qualities.** Apple says to avoid assigning positive or negative qualities to colour, for example, to avoid using the word *blacklist*. Colours should describe colours but should not be used metaphorically.

Universities also have style guides that can help; for example, click here for Dalhousie University's style guide. Gregory Younging's *Elements of Indigenous Style: A Guide for Writing by and About Indigenous Peoples* also offers stylistic advice. These tools can assist you in changing language habits that are exclusive or demeaning.

The Canadian National Anthem has undergone multiple and constant revisions since the music was composed in 1880. In its bilingual version, "O Canada", originally written in French, is inclusive of our two national language groups, French and English. The change to gender neutral phrasing in the Canadian national anthem indicates a cultural shift. Controversies remain, however, about other language used in the anthem. Some secular groups take issue with the reference to "God", and some groups identify the phrase "our home and native land" as problematic. According to *The Canadian Encyclopedia* ("O Canada", n.d.), Toronto City Council voted to recommend that the federal government change the wording to "our home and cherished land" for inclusion of non-native born Canadian citizens. The anthem does not recognize Indigenous Peoples. These changes and omissions are controversial. As business communicators, listening for cultural shifts and reactions can help identify audience needs as well as areas where businesses can reflect and promote social change.

1.9 PLANNING CHECKLIST

John Thill and Courtland Bovee (Thill, J. V., & Bovee, C. L., 2004), two leading authors in the field of business communication, have created a checklist for planning business messages. Use the following checklist, adapted here, to ensure you have adequately prepared to write your message:

1. Assess the context for your message, including the timing, location, and cultural environment.
2. Determine your general purpose: Are you trying to inform, persuade, entertain, facilitate interaction, or motivate a reader?
3. Determine your specific purpose (the desired outcome– what you want your audience to think, feel, or do).
4. Make sure your purpose is realistic.
5. Determine audience size and composition.
6. Determine audience knowledge and awareness of topic.
7. Anticipate probable responses.
8. Select an appropriate channel.

9. Make sure the information provided is accurate, ethical, and pertinent.
10. Make sure your language is inclusive.
11. Make sure your sources are credible.
12. Make sure the message reflects positively on you and your business.

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PART 2: ESSENTIAL TOOLS OF BUSINESS COMMUNICATION

2.0 ESSENTIAL TOOLS OF BUSINESS COMMUNICATION

LINDA MACDONALD AND KAYLER MUTYABULE

Part 2 addresses important techniques for creating effective business communication in written and oral business communication.

The first four chapters concern rhetoric. A quick search of the definition of "rhetoric" reveals very different uses of the word. The first definition in the Cambridge Dictionary is "speech or writing intended to be effective and influence people". The University of Iowa defines rhetoric as "the study and art of writing and speaking well, being persuasive, and knowing how to compose successful writing and presentations." But today, the word "rhetoric" has assumed negative connotations. The first definition of "rhetoric" provided by Dictionary.com is "(in writing or speech) the undue use of exaggeration or display; bombast".

In "Rhetoric: Positive, negative, or both" (2013), Anne Curzan defines rhetoric as "the art of using language effectively in order to persuade others" (para. 3). Michigan Radio Newsroom's three-minute interview with Curzan explains the shift in the connotations of the word over the last decades toward the dark side. Now, according to Curzan, "rhetoric" has negative as well as positive and neutral meanings.

In this textbook, "rhetoric" is defined positively as communication techniques artfully and logically selected to achieve a specific purpose and adapted to the needs of a particular audience, context, and channel.

In addition to rhetorical devices, Part 2 also addresses the essential skills of web literacy. *Mis*information (inaccurate information) and *dis*information (information intentionally false or misleading) are pervasive disruptors of society and of business. Learning how to choose reliable sources and how to verify information in social media posts can contribute to the success of your own personal brand as well as that of your employer.

PART 2 LEARNING OBJECTIVES

By the end of Part 2, you should be able to

- Identify and apply Aristotle's rhetorical elements of *logos*, *ethos*, and *pathos*,
- Develop skills in rhetorical listening,
- Identify and apply techniques of visual rhetoric,
- Apply the cognate strategies in oral and written communication,
- Identify reliable sources, and
- Use fact-checking strategies on online sources.

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2.1 PERSUASION: ARISTOTLE'S RHETORICAL ELEMENTS

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LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Define Aristotle's rhetorical elements of *logos*, *ethos*, and *pathos*
- Identify examples of the use of the three elements in business
- List possible ways you might include each of the three rhetorical elements in presentations and documents

Your employer needs you to have the ability to analyze and evaluate information to solve business problems. How you design an email to a client, how you adjust communications for an international a team, and how you maintain a relationship with a disgruntled client all require the ability to think critically and utilize elements of persuasion.

Most of your communications in business will be informational, but a message announcing the closure of a parking area or updating delivery dates has persuasive elements. Even an informational message aims to convince the reader of your credibility and professionalism and works to foster and maintain a positive relationship with the audience.

Persuasion is the ability to influence someone's actions or beliefs. To succeed in persuading your audience, you need to make a reasonable request, establish your credibility, and show the audience the direct and indirect benefits of granting the request.

Your documents in application for co-op positions are persuasive. In the resume, you will provide **evidence** that you have the background and skills to do the job. You will establish your **credibility** through your affiliation with a reputable university. In establishing your fit with the organization, you will appeal to the reader's **emotions** of pride and loyalty in the company's mission and values. These strategic uses of evidence, credibility, and emotions align with Aristotle's means of persuasion.

ARISTOTLE AND RHETORICAL ELEMENTS

Aristotle outlined the rhetorical strategies of *logos*, *ethos*, and *pathos* two thousand years ago, yet these persuasive devices remain relevant for business today. A sales message, recommendation report, commemorative speech, cover letter, grant proposal, or any other business message requires all three rhetorical devices to be successful.

> One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=55#oembed-1

(Direct link to The Three Persuasive Appeals: Logos, Pathos, and Ethos by Kristina Ulmer video)

Logos

Aristotle defined *logos* as a mode of persuasion appealing to the audience's reasoning. Clear, reasoned arguments supported by evidence make your claims more convincing. If you are promoting a new product, you will need factual evidence about the product's quality to be successful. If you are making changes in service procedures, customer reviews may support the need for change. In requesting health care benefits to add paid sick days for front-line workers, your argument might be supported by employee surveys of workplace satisfaction and statistics on absenteeism compared to numbers of positive pandemic cases.

When incorporating *logos*, you might include:

- data
- graphs
- charts
- statistics
- logical reasoning

Ethos

The *ethos* mode of persuasion refers to establishing authority, credibility, and trust through character and ethics. Credibility is especially important in finance. Banks rely on consumer trust to generate opportunities for building revenue. Loss of trust can be devastating.

Wells Fargo lost trust through a series of scandals. As the title of a CNN report states, "Wells Fargo is a hot mess." Employees opened millions of fake credit card accounts to meet the company's sales targets and charged customers for unnecessary auto insurance. The company was accused of retaliating against whistleblowers and forcing employees to work overtime. As a result of these scandals and the penalties resulting from them, it is, according to Egan, the only major lender to lose money during the pandemic (Egan, 2020). Unethical practices have led to a loss of trust, a loss of credibility, and subsequently, a loss of business.

To build *ethos* in your communications, you might include:

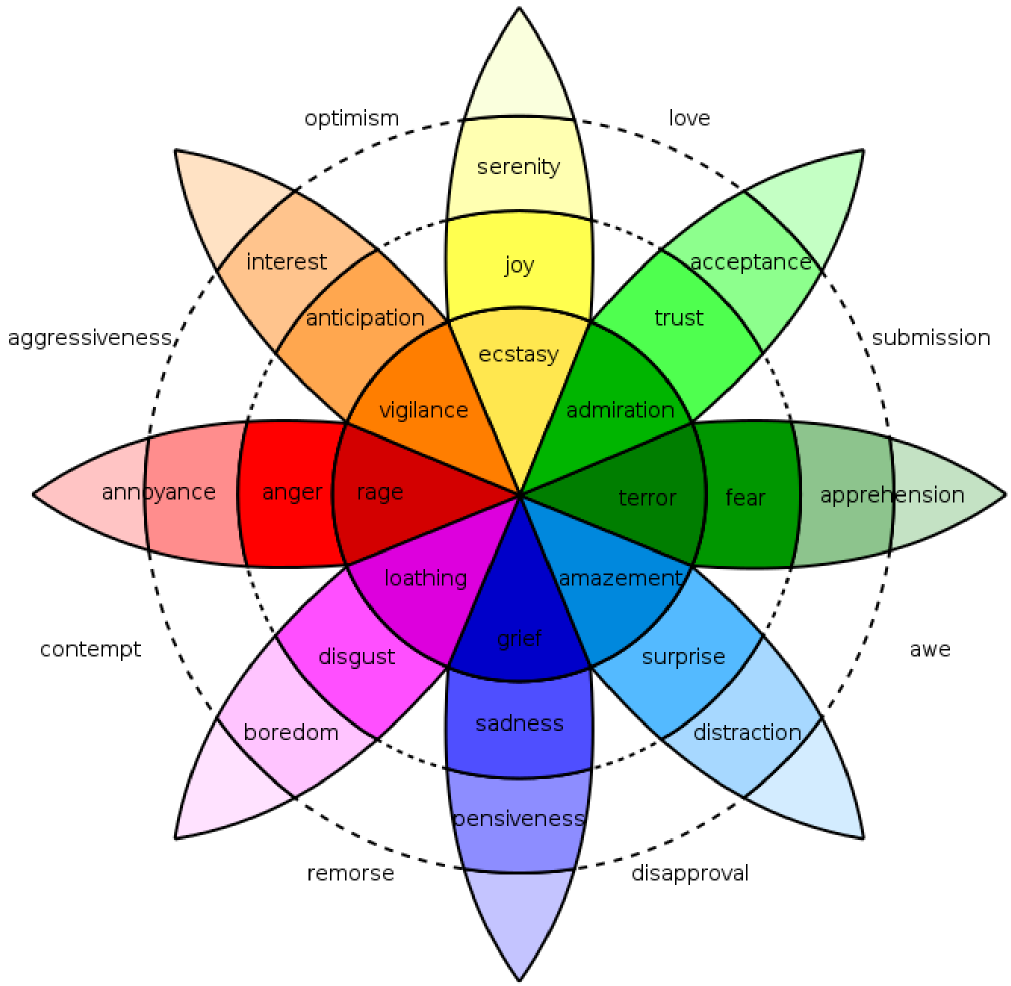
- evidence of ethical business practice
- reference to experts or people familiar to and respected by the audience
- your affiliation and experience as the speaker
- credible sources
- clear, understandable language and minimal jargon or vague terms

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=55#oembed-2

(Direct link to Ethos, Pathos, & Logos: How to Use Persuasive Ad Techniques by StudioBinder video)

Pathos

Robert Plutchik, identified eight basic emotions: joy, trust, fear, surprise, sadness, anticipation, anger, and disgust (Plutchik, 2001). Plutchik wrote that "an emotion is not simply a feeling state. Emotion is a complex chain of loosely connected events that begins with a stimulus and includes feelings, psychological changes, impulses to action and specific, goal-directed behavior. That is to say, feelings do not happen in isolation. They are responses to significant situations in an individual's life, and often they motivate actions" (pp. 345-346). In using pathos, the speaker or writer provides a stimulus to initiate a response.



Andrew Dlugan says, "As a speaker, your goal is to create a shared emotional experience with your audience. Pathos describes your ability to *evoke* audience emotions and strategically *connect* these emotions with elements of your speech."

You can create an emotional response through written communication forms as well. You might, for example, appeal to a donor's sense of pride in and loyalty to a school society, a buyer's homesickness for East Coast Lifestyle, or a hiring committee's interest through story telling in the cover letter

Pathos can be included through:

- pictures
- storytelling
- emotive language
- gestures

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=55#h5p-9

(Personality quiz H5P 7597 by Chandra Hodgson [2020] licensed by CC-BY-NC-SA)

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=55#h5p-10

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Photo: "Aristotle with Mobile Phone, after Francesco Hayez" by Mike Licht, NotionsCapital.com is licensed under CC BY 2.0

2.2 PERSUASION: RHETORICAL LISTENING

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Explain the benefits of listening skills for people in business
- Define active listening
- Define rhetorical listening

Active listening is important to your success in establishing and maintaining business relationships. Business communication is a problem-solving activity, and to understand the problem, we need to actively listen. You cannot assess a client's business plan without listening to their financial goals, sell a computer without listening to what the customer needs from the device, or develop an innovative project without collaborating with colleagues. Listening helps you understand your audience's needs.

Listening also helps in understanding the social environment of your audience, as an example from Adidas demonstrates.

Adidas, in collaboration with Pharrell Williams, produced a blue sneaker with the word *uluntu,* meaning "human race" or "community" across the top of the shoe. "Community" was written in the language Xhosa, a language spoken by millions of South Africans. The shoe, however, was not available in the country that inspired the product (Bain, 2021). As Quartz noted in its news summary *The Memo*, "The Adidas controversy shows that creative industries need to build a checkpoint into their production systems, so that even diverse teams are forced to pause and examine questions of cultural sensitivity. It's not enough to avoid offensive motifs and stereotypes. Before green-lighting anything, somebody should ask: How can we include the populations from which this idea originates? And how can we respect those cultures by providing due credit and, at the very least, the opportunity to engage with the finished product?" (May 26, 2021).

Writer Marc Bain goes on to discuss corporations' exploitation of culture and groups for profit. This problem is particularly apparent in the fashion industry. Bain writes, "It's a common distribution strategy in the sneaker business, where desire for a product tends to rise with its exclusivity, but by not making them available in South Africa, Adidas stumbled onto the wrong side of an issue that has received growing attention in the fashion industry" (Bain, 2021, para. 4). As Bain states, companies should "be more thoughtful in how they take inspiration from a culture. In Adidas's case, that just means at least giving the community that inspired its sneaker the opportunity to buy it" (2021, para. 7).

Adidas has somewhat corrected the problem by making limited quantities available for purchase online, but the damage caused by a failure to engage in rhetorical listening has been done. Adidas did not listen. They did not "hear" the community from which they borrowed to generate profit.

Listening is a critical aspect of business communication. First, we will look at the characteristics of active listening; then we will look at the additional benefits of rhetorical listening.

As a *Forbes* article states (Westover, 2020), active listening in an organization has positive benefits for companies, for leaders and for individuals. Active listening

- builds stronger relationships,
- develops greater trust,
- enables more effective team collaborations,
- enhances individual and group decision-making,
- increases productivity through enhanced creativity and innovation.

Active listening requires a shift from your thoughts and behaviours to the words and behaviours of others. A *Forbes* article on listening defines this skill:

> A recent article by Elle Kaplan defined effective listening as "giving your complete, intentional focus to what someone says, rather than what their words literally mean." Effective listening requires active listening, which the University of the People defines as "a soft skill that directs the focus from what's in your head to the words coming from the outside. By being able to focus on what another person is saying, you can understand needs and information more accurately."
>
> In other words, listening is more than just hearing the words someone is saying, but rather impactful active listening is all about understanding the context in which those words are shared, along with other verbal and nonverbal cues, such as voice inflection, tone, facial expressions and body language. When we actively listen, we practice mindfulness, we are present with those around us and we do not allow distractions to take away our focus on the most [important] thing in that moment: seeking understanding, showing compassion and demonstrating empathy. (Westover, 2020)

Rhetorical listening takes active listening a bit further. This type of listening requires deeply experiencing another person's perspective. This 14-minute video explains rhetorical listening and the "parallax" view that results.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=58#oembed-1

(Direct link to The Rhetoric of Listening: Taking the Parallax View by Pillow Fort Studios video)

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=58#h5p-11

Krista Ratcliffe (2005) argues that rhetorical listening is more than listening: Rhetorical listening is "a stance of openness that a person may choose to assume in relation to any person, text, or culture" (p. xiii). Had Adidas used rhetorical listening, they may have heard their South African audience and marketed their product with cultural sensitivity and respect. They would have increased brand loyalty in Africa and demonstrated ethics rather than exploitation. In communicating in university or the workplace, implement the most important rhetorical strategy: Listen.

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2.3 PERSUASION: VISUAL RHETORIC

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Explain the impact of effective design on readability and persuasive strategy
- Determine the best typefaces for your purpose, audience, and channel
- Explain the importance of restraint and consistency in document design
- Explain the effective use of colour as a persuasive device
- Describe the impact of layout and composition on audience reaction and readability

SELF-REFLECTION

Before reading this chapter, spend a few minutes thinking about these questions:

1. What characteristics would you like prospective employers to see in you?
2. What value do you bring to the employer?
3. How do you want employers to *feel* when they look at your documents?

Design ensures readability. Design can also contribute to the persuasiveness of your message. Poor design, on the other hand, can result in a lack of readability. Even worse, poor design can frustrate or annoy your audience or make the document inaccessible to readers with low vision or to unsighted readers.

To design effectively, consider text, colour, graphics or images, and layout and composition. Visual rhetoric is the effective combination of these elements to inform or persuade your audience. Presentations use visual rhetoric in non-verbal communication. Non-verbal communication will be discussed in a later chapter. This chapter focuses on typeface, colour, and composition in documents and slides and their impact on your audience.

This 6-minute video serves as an introduction to Visual Rhetoric.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=63#oembed-1

(Direct link to Visual Rhetoric by Owl Purdue video)

TEXT

Typeface and font size can affect the readability and persuasiveness of written documents and slides. Because the visual qualities of text can influence the way a viewer thinks and feels, business writers need to have a basic understanding of typography. This six-minute video provides these fundamentals:

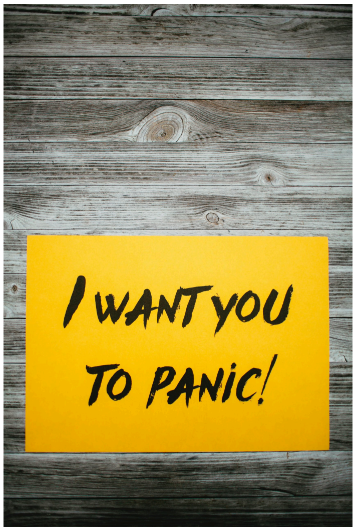
One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=63#oembed-2

(Direct link to Beginning Graphic Design: Typography by GCFLearnFree.org video)

Typeface and Mood

Handwritten letters can communicate information about the writer and convey this feeling to the readers. A person writing from the trenches in WWII might reveal pain or fear through shaky script. A 13-year old might use hearts to replace the dot on an “i” as a demonstration of true love. Cursive writing can convey tradition and formality.

Today, computers offer a wide range of fonts in various weights and sizes. The challenge in the modern world is to select a font that matches the feeling the words are meant to convey.



For example, this protest sign uses a font to convey a sense of urgency in dealing with climate change. The font matches the feeling of panic the protester hopes to create in the reader.

TikTok and Instagram use fonts that appeal to young users, while *The New York Times* and The *Globe and Mail* use serif fonts to reinforce the credibility that comes with older and experienced organizations. The design is selected to inspire confidence and meet the expectations of an older reading audience.

Another example of the ability of a font to convey feeling is illustrated in the next video. The video celebrates the font created by Gilbert Baker, the artist and activist who created the Rainbow flag in 1978. The feeling conveyed by the font is "pride". A comment from *The Huffington Post* in the video describes the font as "a typeface that translates the strength of the rainbow flag into text."

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=63#oembed-3

(Direct link to Type with Pride by NewFest and NYC Pride video)

Keep in mind this ability of fonts to convey feeling as you craft business documents and slides. Ask yourself,

- What is the mood or feeling of the typeface(s) I have chosen?
- What image or impression is suggested by this choice?
- Is the feeling conveyed through the typeface appropriate (does the typeface communicate the feeling you wish to convey)?

For example, Jim would like to open an accounting business. What mood does the typeface convey? Does the typeface suggest the image Jim would like to convey?

Jim's Accounting
Services

Jim's Accounting
Services

Jim's Accounting
Service

Among other possible impressions, the first typeface conveys playfulness, the second conveys immaturity, and the third may indicate that Jim is creepy and/or evil. Not the impressions that Jim would like to send. A better choice is one that conveys reliability and credibility:

Jim's Accounting
Service

This typeface is Baskerville, a serif font carrying "a distinguished feeling of heritage and pedigree" (Gendelman, 2015). The font may look familiar to you: The government of Canada uses a variation of this typeface.

Serif and Sans Serif

Because they convey a professional tone, serif fonts (those with letters that have small tags on them) like Times New Roman, Garamond, Georgia, Baskerville, and Palatino are all popular for printed business and academic documents. When you write a cover letter for a co-op application or a formal report for a client, you need a font that appears trustworthy and reliable. As designer Dylan Todd says, "When you are designing with type, the typeface you choose tells a story" (Adobe InDesign, 2021). The font conveys and affirms the story you would like the audience to hear about you as a young professional or a representative of the organization. Serif fonts are harder to read on lower quality monitors, but some can work well for online content if the font size is adjusted, if the letters do not appear to touch, and if the line height (the space between lines of text) is big enough.

Sans serif fonts like Arial, Calibri, Tahoma, or Verdana Pro have a clean, modern feel, and they work well for online media. You can also see sans serif fonts on posters, store signs, and highway signs because these fonts can be quickly and easily read in small amounts. The quick readability of sans serif fonts make these fonts good for headings in reports. It is not a good idea, however, to use these fonts for large blocks of text, as in a printed report. You may also want to avoid them in cover letters and résumés because the sans serif fonts take up much more space than serif fonts. The industry standard for finance résumés is a single page, and you will need to maximize your space.

Languages that do not use the Latin alphabet also use a variety of font styles. Chinese regularly uses approximately 7,000 of the tens of thousands of characters, so the fonts available are more limited than English with its 26 characters, but a variety of typefaces are available. Just as typefaces using the Latin alphabet convey feeling, variations of Chinese typefaces also carry meaning. "As with Latin fonts, a crucial initial decision is to determine which font 'style' to use. Chinese has two main styles, called Mingti and Heiti, akin to the serif and sans-serif of Latin. Heiti is a bit like sans-serif: clean, straight lines without extra ornamentation at the ends, common on the web. Mingti is similar to serif, with extra embellishment at the end of strokes that give it a more bookish feel" (Sonnad, 2015). The Arabic script also comes in a variety of fonts, and, as with fonts using the Latin alphabet, each font conveys mood or feeling.

Restraint and Consistency

Documents and slides can look busy, cluttered, or incoherent if too many typefaces and sizes are used in a single document or slide set. To maintain a professional look, limit the number of typefaces you use to two or three in a document or slide. In many longer business documents, sans serif fonts are often used in headings with the body text in a serif font. To determine what fonts might be compatible, visit typ.io. The site recommends fonts that work well together and provides examples of how they might be used. For example, the site introduces Baskerville with "Baskerville is a serif font. It goes well with Lucida Grande, Helvetica Neue, Moderat, Open Sans, Adelle, Avenir Next, Frutiger, Avenir, Georgia and Proxima Nova." Canva.com also offers suggestions on font compatibility as well as on colour pallets.

Depending on the typeface, select a type size of 10-12 pt. for body text. In APA Style academic writing, headings use the same typeface and font size as the body. In the workplace, depending on your company's style preferences, headings may be 12-18 pt.

Use type styles like bold, capitalization, or italics to add emphasis. Keep in mind that if too much is emphasized, nothing is emphasized at all.

SELF-REFLECTION

Consider again what characteristics and potential value you want your prospective employer to see in you.

- How can you use typeface to help the audience see these characteristics and your value?
- How can you use typeface to generate the emotions you want the prospective employer to feel when reading your documents?

COLOUR

Like typeface, colour can also reflect mood, and it is equally important to maintain a simple and consistent colour scheme, if colour is used at all. In formal business documents like letters or memos, the use of colour will likely be limited to the logo at the top of the page. Formal reports may use colour on the cover page and in the graphics and figures, but this channel of communication requires restraint to keep the focus on the content. Using colour on report headings in the body of the report can negatively affect the formality and readability. Newsletters, posters, websites, blogs, and annual reports, on the other hand, benefit from more use of colour. As with typeface and font size, consistency and restraint are essential. You will need to balance the elements of *ethos,* and their effect on credibility and professionalism, with the elements of *pathos*, and their effect on mood and feeling.

In some cases, a lack of colour can negatively affect your message. A multiple line graph without colour can make the lines in the graph indistinguishable. The graph, then, loses meaning.

This six-minute video explains the effect and use of colour and will help you in selecting colours for report graphics and slide decks.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=63#oembed-4

(Direct link to Beginning Graphic Design: Colour by GCFLearnFree.org video)

Before selecting colours, check your document for accessibility to ensure you reach all members of your audience . Adobe's colour wheel can help determine if your colour scheme is Colour Blind Safe. The Adobe Accessibility page also has a Contrast Checker. If you are creating a line graph or bar chart, using this contrast checker can help you decide which colours are most appropriate.

LAYOUT & COMPOSITION

The arrangement of visual elements on a page also contributes to its persuasive appeal. A single-spaced block of text with no paragraph breaks or headings can overwhelm a reader. Densely packer PowerPoint slides can have the same detrimental effect. This five-minute video provides an overview of the basics of layout and composition.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=63#oembed-5

(Direct link to Beginning Graphic Design: Layout & Composition by GCFLearnFree.org video)

In reports, negative space (or white space) provides a place for the eye to rest and is essential for distinguishing sections. This white space adds rhetorical appeal by emphasizing organizational structure (an element of *logos*). Consistency in heading styles and alignment of visual elements add to readability. In reports, use a simple style and avoid wrapping text around your tables and figures. Wrapping makes the text more difficult to read on most word processors.

Your cover letter for job applications should also be designed using visual rhetoric. The layout of the business letter enables you to include a personal letterhead, with your name in a larger, bolded type followed by your contact details. The personal letterhead makes it easy for the hiring committee to access your information. The structure of a standard business letter includes negative space between your address, the recipient address, the greeting, the paragraphs, the closing and your name. Your use of this organizational pattern persuades the reader that you understand professional expectations in the workplaces, which demonstrates both *logos* and *ethos*. Following the structure also prevents readers from having to search for your details or standard business letter elements. A lack of readability can lead to frustration or annoyance– emotions you likely do not want to stir when applying for a position.

CONCLUSION

Visual rhetoric has a powerful effect on the persuasiveness of your message. You can use typeface, colour, and layout and composition to change the way your audience feels about you and the topic. Organizations often have departments of communications and marketing that standardize the organization's letterheads, signature blocks, slide decks, and colour choices. These standards maintain the company's brand image. When you are in the workplace, you will need to be familiar with the organization's preferences. In university, some instructors specify the expected layout. Where there are no standards in place, you will need to rely on your understanding of visual rhetoric to develop your strategy.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=63#h5p-12

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2.4 PERSUASION: COGNATE STRATEGIES

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Describe the nine cognate strategies
- Identify ways to apply these strategies in speaking and writing

The ancient Greek teacher Aristotle identified three types of appeals: *logos* (logic), *ethos* (ethics and credibility), and *pathos* (emotional appeal). These elements in presenting an argument are often applied to oral communication, especially public speaking, but they are also fundamental to good writing.

An additional set of tools includes "cognate strategies", or ways of understanding, developed by Charles Kostelnick and David Rogers (1998). Like rhetorical elements, cognate strategies are techniques for developing an effective argument.

Charles Kostelnick and David Roberts (1998) outline several ways of framing, expressing, and representing a message to an audience. The word "cognate" refers to knowledge, and these strategies are techniques to impart knowledge to your audience. The strategies help the writer, designer, or speaker answer questions like "Does the audience understand how I am arranging my information?" "Am I emphasizing my key points effectively?" and "How does my expression and representation of information contribute to a relationship with the audience?" The cognate strategies can serve you to better anticipate and meet your audience's basic needs.

Aristotle outlined three main forms of rhetorical proof: *ethos*, *logos*, and *pathos*. *Ethos* involves the speaker or writer's character and expertise. *Logos* is the logic —something that will be greatly enhanced by a good organizational plan. Aristotle discussed *pathos* as the use of emotion as a persuasive element. We don't always make decisions based on clear thinking. Sometimes we are moved by words, by a scene in a movie, or by other mediated forms of communication.

The cognate strategies are in many ways expressions of Aristotle's three elements.

TONE

From the choice of your words in writing to the choice of your dress in public speaking, you contribute to the tone of your message. Tone conveys feeling.

When you speak, is your voice relaxed, or shaky and nervous? Your voice is like a musical instrument that, when played expressively, fulfills a central role in your ability to communicate your message to your audience. If your voice is shaky, you will communicate anxiety to your audience. How is your tone expressed through your body language? Are your arms straight down at your sides, or crossed in front of you, or are they moving in a natural flow to the rhythm and cadence of your speech? Your dress, your use of space, and the degree to which you are comfortable with yourself all contribute to the message.

In written expression, tone is reflected in language choice and design. The decision to use "hi or "dear" in the opening of an email can indicate whether you are establishing a formal relationship or one that is more casual and friendly. Design elements like typeface and format also communicate tone. Because typefaces communicate feelings, the selection of Times New Roman, with its traditional, textbook style look, can convey trustworthiness, while the developers of the modern font Manrope hope to convey creativity, simplicity, and elegance.

EMPHASIS

If everyone speaks at the same time, it's hard for anyone to listen. In the same way, if all your points are equally presented, it can be hard to distinguish one from another or to focus on the points that are most important. Consider how you place emphasis—stress, importance, or prominence—on some aspects of your speech or document and how you lessen the impact of others. Perhaps you have a visual aid to support your speech in the form of an interesting picture. Emphasis as a cognate strategy asks you to consider relevance and the degree to which your focal point of attention contributes to or detracts from your speech. To use the strategy of emphasis, you will need to consider how you link ideas through transitions, how you repeat and rephrase, and how you organize your points for a powerful start and finish.

In writing, emphasis can be achieved through the placement of words within a sentence, through the placement of sentences within a paragraph, and the placement of paragraphs within the document. The last words of a sentence typically have the most emphasis because of the pause created by the full stop that follows. The second strongest placement is at the start of the sentence. Similarly, the first sentence in a paragraph receives strong emphasis, and this emphasis is heightened by the white space created by the line break between paragraphs or after a heading. The organization of the document can also serve to emphasize or diminish paragraphs or sections. Writers often present the weakest points or the counter-arguments in the middle of a document so that the document begins and ends with stronger points.

Design elements like headings emphasize the structure of the message and stand out on the page because of the surrounding white space. Numbered or bulleted lists break the paragraph form, and the use of white space around them highlights them further. The use of CAPITALIZATION, **bold**, and *italics* also add emphasis. A well-selected word or phrase in bold can dramatically emphasize a point. Note that if there is too much emphasis through capitals, bold, or italics, there is no emphasis at all. No element will stand out, and in fact, your audience can tire quickly. A few words emphasized can work well, but an all-cap message of one sentence or more loses urgency and becomes annoyingly difficult to read.

ENGAGEMENT

Eye contact can help you form a connection—an engagement—with individual audience members. Holding your arms at your sides and bent at the elbow with palms up can also help to establish a relationship with the audience. This gesture is welcoming and friendly. Starting your presentation by asking the audience a question can also form a connection.

A speaker or writer should attempt to form a relationship with the audience. Audiences are more likely to engage if the content is relevant to them. Explaining the benefit of a product for the audience can help them see how it meets their needs. Using "you" instead of "I" or "we" can develop engagement. Student cover letters for co-op jobs often use the first person, "I". This focus on the "I" has an effect on the audience. The potential employer wants to know what you can do for *them.* Their focus is on *their* needs. "I have great team skills" is not as effective as "My collaborative approach and dependability would contribute to the team at PwC."

Interactive social media tools are designed to foster engagement. "Like" and emoji buttons, comment and chat sections, and accessible language contribute to audience engagement.

CLARITY

As a speaker, you may have excellent ideas to present, but if they are not made clear to the audience, your speech will be a failure. Clarity strategies help the receiver (audience) to decode the message, to understand it quickly and completely, and when necessary, to react without ambivalence" (Kostelnick, C. and Roberts, D., 1998). Your word choices, how you say them, and in what order they are said all relate to clarity. If you use euphemisms, or indirect expressions, to communicate a delicate idea, your audience may not follow you. If you use a story or an interesting image and fail to connect it clearly to your main point or idea, your audience will also fail to see the connection. Depending on the audience's background knowledge, the use of jargon may clarify your message or confuse your audience.

You'll also need to consider the visual elements of your presentation or document and how they clarify your information. Is the font sufficiently large on your PowerPoint slide to be read in the back of the room? Is your slide so packed with words that they key ideas are lost in a noise of text? Will it be clear to your listeners how your pictures, motion clips, or audio files relate to the topic? Does the report use headings to clarify the structure and importance of ideas?

CONCISENESS

Being clear is part of being concise. Conciseness refers to being brief and direct in the visual and verbal delivery of your message and avoiding unnecessary intricacy. It involves using words as necessary to get your message across, and no more. If you only have five to seven minutes for a presentation, how will you budget your time? Being economical with your time is a pragmatic approach to ensuring that your attention, and the attention of your audience, is focused on the point at hand. Your supervisor does not have time to read lengthy messages. How can you state your information as briefly and directly as possible without sounding abrupt and rude?

ARRANGEMENT

You will gather and present information in some order. How that order follows the function of communicating your message involves strategically grouping information. Arrangement means order, the organization of visual (and verbal) elements in ways that allow the audience to correctly interpret the structure, hierarchy, and relationships among points of focus in your presentation (Kostelnick, C. and Roberts, D., 1998).

CREDIBILITY

Here we can clearly see Aristotle's *ethos*—character and expertise. You will naturally develop a relationship with your audience, and the need to create trust is key to that development. The word "credibility" comes from the word "credence," or belief. Credibility involves your qualities, capabilities, or power to elicit from the audience belief in your character. Cultivating a sense of your character and credibility may involve displaying your sense of humor, your ability to laugh at yourself, your academic or profession-specific credentials, or your personal insight into the topic you are discussing.

For example, if you are going to present a persuasive speech on the dangers of drinking and driving, and start with a short story about how you helped implement a "designated driver" program, the audience will understand your relationship to the message, and form a positive perception of your credibility. If you are going to persuade the audience to give blood, practice safe sex, or get an HIV test, your credibility on the subject may come from your studies in the medical or public health field, from having volunteered at a blood drive, or perhaps from having had a loved one who needed a blood transfusion. Consider persuasive strategies that will appeal to your audience, build trust, and convey your understanding of the rhetorical situation.

EXPECTATION

Your audience, as we've addressed previously, will have inherent expectations of themselves and of you depending on the rhetorical situation. Expectations involve the often unstated, eager anticipation of the norms, roles and outcomes of the speaker or writer. If you are giving an after-dinner speech at a meeting where the audience members will have had plenty to eat and drink immediately before you get up to speak, you know that your audience's attention may be influenced by their state of mind. The "after-dinner speech" often incorporates humor for this very reason, and the anticipation that you will be positive, lighthearted and funny is implicit in the rhetorical situation. If, on the other hand, you are going to address a high school assembly on the importance of graduating from high school and pursuing a college education, you may also be motivational, funny, and lighthearted, but there will be an expectation that you will also discuss some serious issues as a part of your speech.

REFERENCE

Reference involves attention to the source and way you present your information. If you are a licensed pilot and want to inform your audience about aviation safety, your credibility will play a role. You might also refer to the Transportation Safety Board of Canada occurrence data. The audience won't expect you to personally gather statistics and publish a study, but they will expect you to state where you got your information. If you are talking to a group of children who have never flown before, you will need to consider how to reference key ideas within their scope of experience.

SUMMARY

Consider the cognate strategies and how to address each area to make your message as effective as possible, given your understanding of the rhetorical situation.

Table 2.4.1: "Rhetorical Elements and Cognate Strategies" presents Aristotle's rhetorical elements beside the corresponding cognate strategies as well as their purposes and examples of how they may be carried out in business writing. Incorporating the cognate strategies can make your writing or presentation more effective.

Table 2.4.1

Rhetorical Elements and Cognate Strategies

Aristotle's Rhetorical Elements	Cognate Strategies	Focus	Example in Business Writing
Logos	Clarity	Clear understanding	An announcement will be made to the company later in the week, but I wanted to tell you personally that as of the first of next month, I will be leaving my position to accept a three-year assignment in our Singapore office. As soon as further details about the management of your account are available, I will share them with you.
	Conciseness	Key points	In tomorrow's conference call. Sean wants to introduce the new team members, outline the schedule and budget for the project, and clarify each person's responsibilities in meeting our goals.
	Arrangement	Order, hierarchy, placement	Our department has a matrix structure. We have three product development groups, one for each category of product. We also have a manufacturing group, a finance group, and a sales group; different group members are assigned to each of the three product categories. Within the matrix, our structure is flat, meaning that we have no group leaders. Everyone reports to Beth, the department manager.
Ethos	Credibility	Character, trust	Having known and worked with Jesse for more than five years, I can highly recommend them to take my place as your advisor. In addition to having superb qualifications, Jesse is known for their dedication, honesty, and caring attitude. They will always go the extra mile for their clients.
	Expectation	Norms and anticipated outcomes	As is typical in our industry, we ship all merchandise FOB our warehouse. Prices are exclusive of any federal, state, or local taxes. Payment terms are net 30 days from date of invoice.
	Reference	Sources and frames of reference	According to an article in *Business Week* dated October 15, 2009, Doosan is one of the largest business conglomerates in South Korea.
Pathos	Tone	Expression	I really don't have words to express how grateful I am for all the support you've extended to me and my family in this hour of need. You have made a difficult period more bearable.
	Emphasis	Relevance	It was unconscionable for a member of our organization to shout an interruption while the president was speaking. What needs to happen now—and let me be clear about this—is an immediate apology.
	Engagement	Relationship	As members of our university alumni association, we share a dedication to ensuring the success of our Commerce students.

EXERCISE

Use the table below to help get yourself organized as you start to prepare a speech. Fill in the far right column according to how each rhetorical element, cognate strategy, and focus will apply to the specific speech you are preparing.

Aristotle's Forms of Rhetorical Proof	Cognate Strategies	Focus	My speech will address each element and strategy by (verbal and/or visual)
Pathos	• Tone • Emphasis • Engagement	• Expression • Relevance • Relationship	
Logos	• Clarity • Conciseness • Arrangement	• Clear understanding • Key points • Order, hierarchy, placement	
Ethos	• Credibility • Expectation • Reference	• Character, trust • Norms and anticipated outcomes • Sources and frames of reference	

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2.5 USING RELIABLE SOURCES

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER]

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Identify issues with Google searches
- Conduct a Boolean search using library databases

Unlike writing for personal or academic purposes, your business writing will help determine how well you succeed in your job. Whether you are writing for colleagues within your workplace, outside vendors, or customers, you will want to build a solid, well-earned, and favorable reputation for yourself through your writing. Your goal is to maintain and enhance your credibility, and that of your organization, at all times.

Make sure as you start your investigation that you always question the credibility of the information. Sources may have no reviews by peers or an editor, and the information may be misleading, biased, or even false. Be a wise information consumer.

GIVING CREDIT TO YOUR SOURCES

Whether your material is a photograph, text, a chart or graph, or any other form of media, taking someone else's work and representing it as your own is plagiarism. Plagiarism is committed when you copy material verbatim, paraphrase its wording, or take its ideas without giving credit to the source.

If you are completing a report for a client and fail to take careful notes or if a sentence is present in your writing but later fails to get accurate attribution, it can have a negative impact on you and your organization. That is why it is important that when you find an element you would like to incorporate in your document, you need to immediately note the source in a complete enough form to find it again.

Giving credit where credit is due will build your credibility and enhance your document. Moreover, when your writing is authentically yours, your audience will catch your enthusiasm, and you will feel more confident in the material you produce. Just as you have a responsibility in business to be honest in selling your product or service and avoid cheating your customers, so too do you have a responsibility in business writing to be honest in presenting your idea and the ideas of others and to avoid cheating your readers with plagiarized material.

CHALLENGES OF ONLINE RESEARCH

The Internet is an amazing source of information, but for that very reason, it is a difficult place to get information you actually need. In the early years of the Internet, there was a sharp distinction between a search engine and a Web site. There were many search engines competing with one another, and their home pages were generally fairly blank except for a search field where the user would enter the desired search keywords or parameters. Many search sites exist today, but a few search engines have come to dominate the field, including Google and Yahoo! Moreover, most search engines' home pages offer a wide range of options beyond an overall Web search; buttons for options such as news, maps, images, and videos are typical. Another type of search engine performs a metasearch, returning search results from several search engines at once (Dogpile, for example, performs metasearches).

When you are looking for a specific kind of information, these relatively general searches can still lead you far away from your desired results. In that case, you may be better served by an online dictionary, encyclopedia, business directory, or phone directory. There are also specialized online databases for almost every industry, profession, and area of scholarship; some are available to anyone, others are free but require opening an account, and some require paying a subscription fee.

The following slides introduce you to advanced online research skills.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=67#h5p-13

Slides adapted from H5P 12681 by Chandra Hodgson (2020) licensed under CC-BY-NC-SA

EVALUATING YOUR SOURCES

One aspect of Internet research that cannot be emphasized enough is the abundance of online information that is incomplete, outdated, misleading, or downright false. Anyone can put up a Web site; once it is up, the owner may or may not enter updates or corrections on a regular basis. Anyone can write a blog on any subject, whether or not that person actually has any expertise on that subject. Anyone who wishes to contribute to a Wikipedia article can do so—although the postings are moderated by editors who have to register and submit their qualifications. It is always important to look beyond the surface of a site to assess who sponsors it, where the information displayed came from, and whether the site owner has a certain agenda.

When you write for business and industry you will want to draw on reputable, reliable sources—printed as well as electronic ones—because they reflect on the credibility of the message and the messenger. Analyzing and assessing information is an important skill in the preparation of writing. In general, documents that represent quality reasoning have the following traits:

- A clearly articulated purpose and goal
- A question, problem, or issue to address
- Information, data, and evidence that is clearly relevant to the stated purpose and goals
- Inferences or interpretations that lead to conclusions based on the presented information, data, and evidence
- A frame of reference or point of view that is clearly articulated
- Assumptions, concepts, and ideas that are clearly articulated

An additional consideration is how credible the source is. This question is difficult to address even with years of training and expertise. Academics have long cultivated an understood acceptance of the role of objective, impartial use of the scientific method to determine validity and reliability. But as research is increasingly dependent on funding, and funding often brings specific points of view and agendas with it, pure research can be—and has been—compromised. You can no longer simply assume that "studies show" something without awareness of who conducted the study, how it was conducted, and who funded the effort. This may sound like a lot of investigation and present quite a challenge, but again it is worth the effort.

Information literacy is an essential skill set in the process of writing. As you learn to spot key signs of information that will not serve to enhance your credibility and contribute to your document, you can increase your effectiveness as you research and analyze your resources. For example, if you were researching electronic monitoring in the workplace, you might come upon a site owned by a company that sells workplace electronic monitoring systems. The site might give many statistics illustrating what percentage of employers use electronic monitoring, what percentage of employees use the Internet for non-work purposes during work hours, what percentage of employees use company e-mail for personal messages, and so on. But the sources of these percentage figures may not be credited. As an intelligent researcher, you need to ask yourself, did the company that owns the site perform its own research to get these numbers? Most likely it did not—so why are the sources not cited? Moreover, such a site would be unlikely to mention any court rulings about electronic monitoring being unnecessarily invasive of employees' privacy. Less biased sources of information would be the Office of the Privacy Commissioner of Canada, the Canada Labour Code, and nonprofit organizations looking at safety and security.

To access reliable sources, use your Library's Business, Management, or Commerce subject guides. These guides direct you to reliable sources

It may seem like it's hard work to assess your sources and to make sure your information is accurate and truthful, but the effort is worth it. Business and industry rely on reputation and trust (just as we individuals do) in order to maintain healthy relationships. Your document, regardless of how small it may appear in the larger picture, is an important part of that reputation and interaction.

The next chapter introduces tools you can use to assess information from social media sites.

2.6 WEB FACT-CHECKING

MIKE CAULFIELD AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Define misinformation and disinformation
- Identify Caulfield's Four Moves to get closer to the truth of online information
- Check for previous work with fact-checking tools
- Identify the original source of information
- Use tools for identifying trolls

The web offers endless information and opportunity. It also poses unique challenges. Much of the information you access in your daily work is through social media streams. To deal with the information flow, you need concrete strategies and tactics for tracing claims to sources and for analyzing the nature and reliability of those sources. These skills in evaluation and analysis are especially important in business. As an NBC News piece (April 25, 2019) stated,

> Whether it's faking a letter from a chief executive to alter a corporate strategy, or staging a car crash to imply a faulty vehicle, fake news that generates headlines can–and has–hurt a company's bottom line, pushing the stock price down and setting off a public relations nightmare that is, in many cases, irreversible.

Tesla, for example, faced one of these public relations nightmares in 2019 when a video appeared to show the self-driving Model S hitting an autonomous robot as it made its way to a consumer electronics show. The film of the car hitting the robot actually shows a rope pulling the robot over in front of it. The NBC article says that experts believe that the disinformation about the vehicle was calculated–designed to negatively affect public confidence and attack Tesla's brand image.

Other companies have also been targeted by disinformation campaigns. Starbucks was falsely said to be giving free drinks to undocumented immigrants in the United States, and Tim Horton's was falsely said to be running out of donuts the day after cannabis was legalized in Canada.

Misinformation, incorrect information,and disinformation, deliberately misleading information, can affect a business' consumer confidence and bottom line. Your ability to identify inaccuracies can help prevent the spread of bad information, help you critically evaluate information as a consumer, and help you address any disinformation in your own organization.

This chapter provides you with a few of the web-based techniques that can get you closer to the truth on the web more quickly.

FOUR MOVES

Michael Caulfield recommends that to move closer to the truth in information, you can do the following:

- **Check for previous work:** Look around to see if someone else has already fact-checked the claim or provided a synthesis of research.
- **Go upstream to the source:** Go "upstream" to the source of the claim. Most web content is not original. Get to the original source to understand the trustworthiness of the information.
- **Read laterally:** Read laterally. Once you get to the source of a claim, read what other people say about the source (publication, author, etc.). The truth is in the network.
- **Circle back:** If you get lost, hit dead ends, or find yourself going down an increasingly confusing rabbit hole, back up and start over knowing what you know now. You're likely to take a more informed path with different search terms and better decisions.

In general, you can try these moves in sequence. If you find success at any stage, your work might be done. When you encounter a claim you want to check, your first move might be to see if sites like *Politifact*, *Snopes*, or even *Wikipedia* have researched the claim (Check for previous work).

If you can't find previous work on the claim, start by trying to trace the claim to the source. If the claim is about research, try to find the journal it appeared in. If the claim is about an event, try to find the news publication in which it was originally reported (Go upstream).

Maybe you get lucky and the source is something known to be reputable, such as the journal *Science* or the newspaper the *New York Times*. Again, if so, you can stop there. If not, you're going to need to *read laterally*, finding out more about this source you've ended up at and asking whether it is trustworthy (Read laterally).

And if at any point you fail–if the source you find is not trustworthy, complex questions emerge, or the claim turns out to have multiple sub-claims–then you circle back, and start a new process. Rewrite the claim, try a new search of fact-checking sites, or find an alternate source (Circle back).

The rest of this chapter will focus on the first two of Caulfield's moves, checking for previous work and going upstream to the source. The chapter will also present ways to "spot the troll".

Please use *Duckduckgo* for the following activities to protect your privacy. This search engine has several advantages listed on its website:

- Your search history is kept private.
- The site blocks hidden trackers.
- The site gives you unbiased results that are not based on your search history.
- The company says it has a pro-privacy business model.

CHECK FOR PREVIOUS WORK

When fact-checking a particular claim, quote, or article, the simplest thing you can do is to see if someone has already done the work for you. You can use a reputable fact-checking source. You can also check particular sources using the "site" option.

Information from educational institution sites (often ending in .edu) and government websites (ending in .gc.ca; ourcommons.ca; .canada.ca; or parl.ca) may provide verifiable information. Online encyclopedias like *The Canadian Encyclopedia* can also be used for fact verification as well as reputable scientific organizations and history museums.

A reputable fact-checking site or subject wiki may have done much of the leg work for you by tracing claims to their source, identifying the owners of various sites, and linking to reputable sources for counterclaims. WhatsApp provides a link to the IFCN fact-checking chat bot that can be used to search information that appears on its social media. The bot uses information from organization around the world to verify information. Some of the sites listed below are among the signatories of the IFCN Code of Principles and have committed to non-partisan and accurate information.

The following organizations are generally regarded as reputable fact-checking organizations focused on Canadian news:

- *AFP Canada*
- *FactsCan*
- *Polimeter*

The following organizations are generally regarded as reputable fact-checking organizations focused mainly on U.S. national news:

- *Politifact*
- *Factcheck.org*
- *Washington Post Fact Checker*
- *Snopes*

- *Truth be Told*
- *NPR Fact-Check*

Respected specialty sites cover niche areas such as climate, for example:

- *Climate Feedback*
- *SciCheck*
- *Quote Investigator*

Many fact-checking sites can be found outside the U.S. and Canada, including

- *El Polígrafo* (Mexico)
- *The Hound* (Mexico)
- *Guardian Reality Check* (UK)
- *BBC Reality Check* (UK)
- *Channel 4 Fact* Check (UK)
- *Full Fact*(UK)

You can find previous fact-checking by using the "site" option in search engines such as *Google* and *DuckDuckGo* to search known and trusted fact-checking sites for a given phrase or keyword. For example, if your housemate finds a post on social media about a free $25 gift card and it sounds too good to be true, you can search a couple known fact-checking sites for the keywords "Tim Hortons free gift card".

According to its website, Snopes is the oldest and largest online fact-checking site. It's reputation is upheld by other fact checking sources like FactCheck.org. Let's use the *DuckDuckGo* search engine to look for the keywords using the format below and the Snopes site. Note the use of spacing between words and the punctuation. This format narrows your search to a specific site. Click on the link below. The first item listed will take you directly to the relevant Snopes page (Click the x on top right of the pop-up box if you get a message about ad blockers).

Click here to begin : Tim Hortons free gift card:site:snopes

Select the first item to go to the Snopes page.

The results show that work has already been done in this area. In fact, the first result from *Snopes* answers our question almost fully. Remember to follow best search engine practice: scan the results and focus on the URLs and the blurbs to find the best result to click in the returned result set.

EXERCISES: "SITE:" FUNCTION

1. Use Duckduckgo to find out whether a 1997 Archie comic predicted virtual schooling in 2021. Use the site poynter.org. Check your punctuation, spelling, and spacing if you do not get results.
2. In your Commerce program, you may be asked to find information from Statistics Canada. Use the "site" function to look for information on the GDP from Statistics Canada (statcan.gc.ca).

GO UPSTREAM TO THE SOURCE

The second move, after finding previous fact-checking work, is to "go upstream." We use this move if previous fact-checking work was insufficient for our needs.

What do we mean by "go upstream"?

Consider this claim on the conservative site the *Blaze*:

Report: US Government Ethics director approved controversial Trump tweets

Kaitlyn Schallhorn December 30, 2016 4:02 pm

Getty Images/Drew Angerer

34 Follow

SHARE TWEET

Controversial tweets from the U.S. Office of Government Ethics that praised President-elect Donald Trump were approved by Director Walter M. Shaub personally, the Daily

Is this claim true?

Of course we can check the credibility of this article by considering the author, the site, and when it was last revised. We'll do some of that, eventually. But it would be ridiculous to do it on this page. Why? Because like most news pages on the web, this one provides no original information. It's just a rewrite of an upstream page. We see the indication of that here:

> Controversial tweets from the U.S. Office of Government Ethics that praised President-elect Donald Trump were approved by Director Walter M. Shaub personally, the Daily Dot reported Friday.
>
> Through a Freedom of Information Act, the Daily Dot reported that Shaub sent an email ordering an OGE official to post the tweets. The series of tweets posted Nov. 30 applauded Trump for his supposed efforts to alleviate conflicts of interest with his businesses.

All the information here has been collected, fact-checked (we hope!), and written up by the *Daily Dot*. It's what we call "reporting on reporting." There's no point in evaluating the *Blaze's* page.

So what do we do? Our first step is to go upstream. Go to the original story and evaluate it. When you get to the *Daily Dot*, then you can start asking questions about the site or the source. And it may be that for some of the information in the *Daily Dot* article you'd want to go a step further back and check their primary sources. But you have to start there, not with *Blaze*.

SPOT THE TROLL

"Spot the Troll" was created by The Clemson University Media Forensics Hub. The site asks you to determine whether or not the images in the examples are from real people or from an internet troll. An internet troll may be either a "bot", a social media account run by a computer, or an individual whose sole purpose is writing posts with upsetting or confrontational content to provoke an emotional response. Although "Spot the Troll" contains American content, trolls have also spread disinformation in Canada, as a study by Ahmed Al-Rawi at Simon Fraser University shows.

EXERCISE: SPOT THE TROLL

Complete the quiz linked here. Be sure to read the full analysis provided by the site on each answer page. The quiz and readings will require approximately ten minutes.

CONCLUSION

According to a study published in *Science* (2018), disinformation is 70% more likely to be retweeted than true information (para. 13). An organization that is the target of this disinformation may suffer financial and reputational loss. This chapter covers just a few of the tools you can use to verify information from the online news organizations, advertisements, or social media. Michael Caulfield's book can provide you with additional tools for reverse image searching, identifying sponsored content, or searching viral content.

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PART 3: PRESENTATIONS

3.0 PRESENTATIONS

LINDA MACDONALD AND KAYLER MUTYABULE

Part 3 focuses on skills of public speaking and presenting. For most people, the mere thought of speaking in front of an audience prompts a fear response, and part of our focus in this section is on how to deal with this anxiety.

After discussing the various methods of presentation in face-to-face and online delivery, we will discuss storytelling, which helps in engaging your audience through *pathos* (emotional appeals) . A clearly structured, well organized presentation persuades your audience through the rhetorical elements of *logos* (logic and evidence) and *ethos* (credibility). Having a clear direction also boosts your confidence. After discussing planning, storyboarding, and outlining your presentation, we will discuss verbal and nonverbal delivery techniques.

With the right tools, you can become more confident in speaking, and this confidence will lead to a stronger relationship with your audience.

PART 3 LEARNING OBJECTIVES

By the end of Part 3, you should be able to

- Identify ways to manage speech anxiety,
- Apply an appropriate delivery method for a particular purpose,
- Connect with an audience through story.
- Deliver an appropriate Land Acknowledgement,
- Select an appropriate organizational pattern,
- Create a storyboard and outline for your presentation,
- Create well-designed presentation slides,
- Identify the principles and types of nonverbal communication,
- Apply effective techniques for speech delivery, and
- Answer audience questions appropriately.

3.1 MANAGING SPEECH ANXIETY

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Identify specific techniques for dealing with fear of public speaking

Your success in business depends on your ability to speak– to tell your story to interviewers, to present recommendations to a client, to express your ideas to your team members, to pitch your product to investors. Speaking in public, whether with a small group or a large audience, develops your critical thinking, leadership skills, and professionalism and promotes you and your ideas.

Despite the opportunities that come with presenting a speech, nearly everyone suffers from anxiety of public speaking. The Greeks gave us ways to understand and use rhetoric and the rhetorical appeals of *logos*, *ethos*, and *pathos* (discussed in Chapter 2.1)*;* they also gave us a term for speech anxiety– glossophobia, from *glossa* meaning "tongue" and *phobos* meaning "fear" or "panic". Our fears have been heightened by speaking in online meetings and virtual events. Online anxiety is exacerbated by the lack of direct eye contact and every fumble to find the unmute button. Social anxiety compounds speech anxiety.

This short Jerry Seinfeld clip explains the extent of our number one fear.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=77#oembed-1

(Direct link to Seinfeld Clip)

In his YouTube video, "Why do we fear public speaking?", Dave Guin tells us that we are biologically engineered to be cowards. Through a story about an early man facing a prehistoric bear in a cave, he compares fear of public speaking to the fear of the unknown. Every one of us, in our common humanity, Guin says, is afraid of the unknown and of public speaking. To manage this fear of speaking, Guin says we must desensitize ourselves. By practicing and putting ourselves forward, we reduce our fear. For many university students, however, it is not the prehistoric bear Guin describes that prompts a flight response but one's peers.

As university co-op students of Commerce you are in a unique position. You are planning to enter a professional workplace but your classroom training is among social peers. Like all humans, you want to be included in your social group. Early peoples knew that staying with the group provided protection. Being rejected by the group could lead to vulnerability and death. Our biology drives us to stay with the group. The fear of social isolation is normal. Remember, though, that nearly everyone in the room shares this same fear. You may not overcome your instinctive fear, but you can manage it.

One way to deal with your fear is to turn the attention away from how you feel and toward how the audience feels. When you watch a speaker who is anxious and fumbling with the clicker, shifting weight from one hip to another, pacing quickly, or taking a lengthy pause or filling time with excessive "ums" and "uhs", you begin to feel anxious yourself. As a member of the audience, you may feel concerned for the speaker and shift from listening to the content to focusing on the body movements. Audiences reflect the speaker's feeling. If you speak with confidence in an interview, you are more likely to inspire the audience to feel confident in your abilities. If you are enthusiastic about your new business plan, investors will be more likely to become enthused themselves. Emotions are contagious.

To share a positive presence with your audience, find your confidence. Caroline Goyder's TEDx Talk offers three techniques to access the confidence within us. Watch her 19-minute presentation.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=77#oembed-2

(Direct link to Caroline Goyder's Ted Talk: The surprising secret to speaking with confidence.)

To manage your anxiety, remember that your fear response is natural and normal, focus on your audience's needs, and use the confidence within you. The following chapters will introduce additional ways to manage anxiety, including organizing the content of your presentation and practicing the vocal techniques and body movements that you will use in your delivery.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=77#h5p-14

3.2 METHODS OF PRESENTATION DELIVERY

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; ANDREW STRACUZZI; AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Identify and describe the four methods of delivery
- Organize an impromptu speech
- Design a manuscript for presentation
- Explain the need for practice in delivering extemporaneously
- Explain the advantages and disadvantages of memorization

THE IMPORTANCE OF DELIVERY

Delivery is what you are probably most concerned about when it comes to giving presentations. This chapter is designed to help you give the best delivery possible and eliminate some of the nervousness you might be feeling. To do that, you should first dismiss the myth that public speaking is just reading and talking at the same time. Speaking in public has more formality than talking. During a speech, you should present yourself professionally. This means making yourself presentable by being well groomed and wearing clean, appropriate clothes for the situation. It also means being prepared to use language correctly and appropriately for the audience and the topic, to make eye contact with your audience, and to look like you know your topic very well.

METHODS OF PRESENTATION DELIVERY

There are four methods of delivery that can help you balance between too much and too little formality when giving a presentation.

Impromptu Speaking

Impromptu speaking is the presentation of a short message without advance preparation. You have probably done impromptu speaking many times in informal, conversational settings. Self-introductions in group settings are examples of impromptu speaking: "Hi, my name is Maru, and I'm an account manager." Another example of impromptu presenting occurs when you answer a question such as, "What did you think of the report?" Your response has not been pre-planned, and you are constructing your arguments and points as you speak.

The advantage of this kind of speaking is that it's spontaneous and responsive in an animated group context. The disadvantage is that the speaker is given little or no time to contemplate the central theme of their message. As a result, the message may be disorganized and difficult for listeners to follow.

This step-by-step guide that may be useful if you are called upon to give an impromptu presentation in public:

1. Take a moment to collect your thoughts and plan the main point you want to make.
2. Thank the person for inviting you to speak. Avoid making comments about being unprepared, called upon at the last moment, on the spot, or feeling uneasy.
3. Deliver your message, making your main point as briefly as you can while still covering it adequately and at a pace your listeners can follow.
4. If you can use a structure, using numbers if possible: "Two main reasons . . ." or "Three parts of our plan. . ." or "Two side effects of this drug. . ." Timeline structures are also effective, such as "past, present, and future" or "East Coast, Midwest, and West Coast".
5. Thank the person again for the opportunity to speak.
6. Stop talking (it is easy to "ramble on" when you don't have something prepared). If in front of an audience, don't keep talking as you move back to your seat.

Impromptu presentations are generally most successful when they are brief and focus on a single point.

For additional advice on impromptu speaking, watch the following 4 minute video from Toastmasters: *Impromptu Speaking*:

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=81#oembed-1

(Direct link to Toastmasters Impromptu Speaking)

MANUSCRIPT PRESENTATIONS

Manuscript presentations are the word-for-word iteration of a written message. The advantage of reading from a manuscript is the exact repetition of original words. In some circumstances this exact wording can be extremely important. For example, reading a statement about your organization's legal responsibilities to customers may require that the original words be exact. Acceptable uses of a manuscript include

- Highly formal occasions (e.g. a commencement speech)
- Particularly emotional speeches (e.g. a wedding speech, a eulogy)
- Situations in which word-for-word reading is required (e.g. a speech written by someone else; a corporate statement; a political speech)
- Within a larger speech, the reading of a passage from another work (e.g. a poem; a book excerpt).

Manuscript presentations, however, have a significant disadvantage: Your connection with the audience may be affected. Eye contact, so important for establishing credibility and relationship, may be limited by reading, your use of gestures will be limited if you are holding a manuscript, and a handheld manuscript itself might appear as a barrier between you and the audience. In addition, it is difficult to change language or content in response to unpredictable audience reactions. The speaker can appear to be connected to the manuscript, not the audience.
You can develop strategies to mitigate these disadvantages. Use a conversational tone. To speak conversationally,

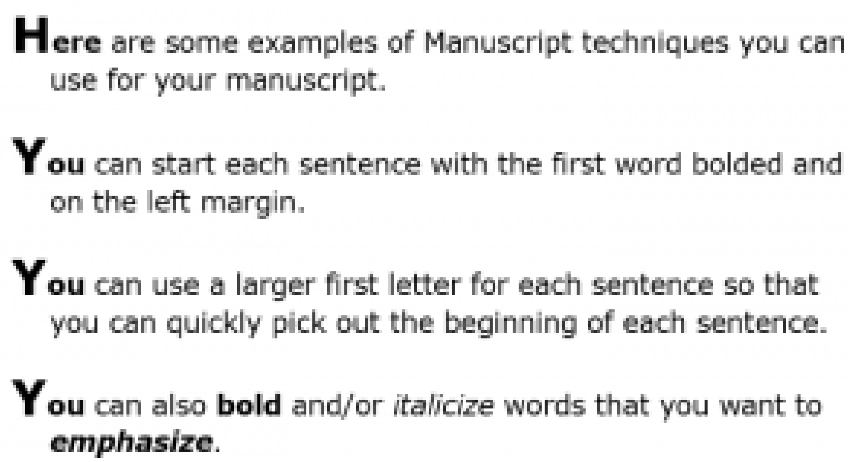
- Write the speech in a conversational style, and
- Practice your speech so that it flows naturally.

Preparation will make the presentation more engaging and enhance your credibility:

- Select and edit material so that it fits within your time limit,
- Select material that will be meaningful for your particular audience,
- Know the material well so that you can look up at your audience and back at the manuscript without losing your place, and
- Identify key words for emphasis.

An essential part of preparation is preparing your manuscript. The following suggestions are adapted from the University of Hawai'i Maui Community College Speech Department:

- **Make the manuscript readable.**
    - Use a full 8.5 x 11inch sheet of paper, not notecards.
    - Use only one side of the page.
    - Include page numbers.
    - Use a double or triple line spacing.
    - Use a minimum of 16 pt. font size.
    - Avoid overly long or complex sentences.
    - Use bold or highlight the first word of each sentence, as illustrated by the [University of Hawai'i.]()



Here are some examples of Manuscript techniques you can use for your manuscript.

You can start each sentence with the first word bolded and on the left margin.

You can use a larger first letter for each sentence so that you can quickly pick out the beginning of each sentence.

You can also **bold** and/or *italicize* words that you want to ***emphasize***.

- **Mark up your manuscript.**
    - Add notations—"slow down," "pause," "look up," underline key words, etc. as reminders about delivery.
    - Highlight words that should be emphasized.
    - Add notes about pronunciation.
    - Include notations about time, indicating where you should be at each minute marker.

To deliver the speech effectively, make sure you are comfortable with the manuscript delivery style. To engage your audience,

- Practice your presentation.
- Try to avoid reading in a monotone. Just as contrast is important for document design, contrast is important in speaking. Vary your volume, pace, tone, and gestures.
- Make sure that you can be clearly understood. Speak loud enough that the back of the room can hear you, pronounce each word clearly, and try not to read too fast.
- Maintain good eye contact with your audience. Look down to read and up to speak.

- Match gestures to the content of the speech, and avoid distracting hand or foot movements.
- If there is no podium, hold the manuscript at waist height.

EXTEMPORANEOUS PRESENTATIONS

Extemporaneous presentations are carefully planned and rehearsed presentations, delivered in a conversational manner using brief notes or a slide deck. By using notes rather than a full manuscript, the extemporaneous presenter can establish and maintain eye contact with the audience and assess how well they are understanding the presentation as it progresses.

To avoid over-reliance on notes or slides, you should have strong command of your subject matter. Then select an organizational pattern that works well for your topic. Your notes or slide deck should reflect this organizational pattern. In preparation, create an outline of your speech.

Watch some of the following 10-minute video of a champion speaker presenting an extemporaneous speech at the *2017 International Extemporaneous Speaking National Champion. :*

> One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=81#oembed-2

(Direct link to 2017 International Extemporaneous Speaking National Champion video)

Presenting extemporaneously has some advantages. It promotes the likelihood that you, the speaker, will be perceived as knowledgeable and credible since you know the speech well enough that you don't need to read it. In addition, your audience is likely to pay better attention to the message because it is engaging both verbally and non-verbally. It also allows flexibility; you are working from the strong foundation of an outline, but if you need to delete, add, or rephrase something at the last minute or to adapt to your audience, you can do so.

Adequate preparation cannot be achieved the day before you're scheduled to present, so be aware that if you want to present a credibly delivered speech, you will need to practice many times. Extemporaneous presenting is the style used in the great majority of business presentation situations.

MEMORIZED SPEAKING

Memorized speaking is the recitation of a written message that the speaker has committed to memory. Actors, of course, recite from memory whenever they perform from a script in a stage play, television program, or movie scene. When it comes to speeches, memorization can be useful when the message needs to be exact and the speaker doesn't want to be confined by notes.

The advantage to memorization is that it enables the speaker to maintain eye contact with the audience throughout the speech. Being free of notes means that you can move freely around the stage and use your hands to make gestures. If your speech uses visual aids, this freedom is even more of an advantage. However, there are some real and potential costs.

First, unless you also plan and memorize every vocal cue (the subtle but meaningful variations in speech delivery, which can include the use of pitch, tone, volume, and pace), gesture, and facial expression, your presentation will be flat and uninteresting, and even the most fascinating topic will suffer. Second, if you lose your place and start trying to ad lib, the contrast in your style of delivery will alert your audience that something is wrong. More frighteningly, if you go completely blank during the presentation, it will be extremely difficult to find your place and keep going. Memorizing a presentation takes a great deal of time and effort to achieve a natural flow and conversational tone.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=81#h5p-15

3.3 ONLINE PRESENTATION DELIVERY

LUCINDA ATWOOD AND CHRISTIAN WESTIN

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Identify points to consider in selecting an app for online presentations and meetings
- Explain best practices in for online presentations and meetings

Presenting online is different from presenting in person. You need to think about tools and lighting as well as structure and delivery.

APPS

If you are arranging an online meeting or event, you can choose from different apps, including: *Zoom*, *FaceTime*, *Skype*, *Webex* and *MS Teams*. When deciding which one to use, consider the following:

- **Security:** Some workplaces or institutions have restrictions on what apps you can use due to security and privacy concerns.
- **Familiarity:** Try to choose the app that's most familiar to you and your attendees.
- **Ease of use:** Choose an app that's easy to use.
- **Fees and limitations:** Some services have fees or limitations on number of participants or maximum times.
- **Features:** Make sure the app has the features you want, such as polls, surveys, reactions, whiteboard, chat, an option to phone in, and conference vs. webcast (2-way vs. 1-way communication), and ability to record the meeting.

PRO TIP

Download the online meeting app you'll be using onto a second device, for example your phone, in case your main device crashes.

EQUIPMENT

You've chosen the app you'll use. Now you need to think about the equipment you'll need, including audio, camera and lighting, device, and internet connection.

Audio

Clear audio is key for online presentations. If the audience can't see your video clearly, they can still follow by listening. But if the audio isn't clear, your message is almost guaranteed to be lost. Here are some tips to ensure your audio is clear:

- **Use headphones, earbuds, or a mic.** These tools help isolate your voice from background noise and prevent audio feedback.
- **Minimize background noise.** Close windows and doors, turn off anything making noise, put pets away, and ask anyone nearby to keep their sound to a minimum.
- **Mute yourself when not speaking.** Muting is especially important if you are an audience member or part of a presentation but not actively speaking.

Camera and Lighting

Your camera and lighting should create a polished, professional visual. Here's how to do that:

- **Centre your camera and raise it to eye level**. Put your camera or device on a book or cardboard box if you need to.
- **Put your view of the audience as close as possible to the camera.** Placing the camera close helps you seem to be looking at the audience.
- **Clean up! Or use a virtual background.** What's behind you counts. Make your background tidy and professional (we'd rather not see your dirty laundry or roommates wandering around in their underwear). Some apps let you use a virtual background.
- **Avoid backlighting.** Have more light in front of your face than behind it. Otherwise the audience can't see your face.

Devices

Various devices can be used to connect to online presentation platforms, including smartphones, tablets, and computers.

- **Laptop and Desktop applications are best.** These typically have more features and stability than tablet and mobile versions.
- **Keep devices and apps up to date.** To ensure security, reliability, and availability of all features.

- **Close non-essential apps.** This helps your device run more efficiently and reduces the possibility of lagging or crashing.
- **Be empowered.** Plug your device in or make sure the battery is fully charged.

Internet Connection and Wi-Fi

Having a great presentation and a great hardware setup won't matter if you can't connect to your audience due to poor internet connection. Some best practices include:

- **Do a speed test ahead of time.** Many platforms, like Zoom, recommend minimum bandwidth speeds for various meeting types, typically starting at 2.0 Mbps for a single screen.
- **Reduce bandwidth hogging.** If someone else in your home is streaming video or online gaming, your connection speed will slow down.
- **Ensure Wi-Fi strength.** If you're far away from your router, the Wi-Fi connection may be poor. Move closer to the router or use a hardwired connection.

By Anna Shvets. Free use authorized without attribution via Pexels.com

BEST PRACTICES FOR ONLINE PRESENTATIONS AND MEETINGS

Professionalism

Oops! By now many of us have laughed or cringed at the “Zoom fails” videos we see online. They’re entertaining, but many people have been fired, embarrassed, or damaged their professional reputation because of unprofessionalism in online meetings. Make sure you remain professional.

- **Don’t let your tech embarrass you.** Clear your desktop and any unnecessary open windows or browser tabs. Turn off notifications (use do not disturb mode). Always assume that your mic and camera are live.
- **Set your environment.** Alert housemates, put pets away, and tidy your physical background. Never attend meetings from bed.
- **Dress appropriately.** You probably don’t need to dress formally, but it’s important to wear appropriate attire
- **Pay attention to the meeting.** Act as professionally in an online meeting as you would in person, meaning no sleeping, browsing, facebooking, cooking, vaping, driving, or anything else that competes for your attention. Keeping your camera on is a great way to show that you’re paying attention
- **Connect 3 minutes early.** Punctuality is very important

PRO TIP

Many online meeting platforms allow you to set your name and a professional picture in your meeting profile. Use a small professional headshot, and change your name to what you want people in the meeting to call you.

Attending a meeting

Even if you’re not running the meeting, you still need to be professional.

- **RSVP:** Reply to all invitations – let them know if you plan to attend.
- **Prepare your tech tools.** Update or download any required apps. Do a practice call with a colleague or friend if you’re unsure of the app or your equipment.
- **Use the mute button.** Always keep yourself muted when you’re not speaking. Know how to unmute yourself quickly (some programs like Zoom allow you to hold down the spacebar to temporarily unmute yourself).

Hosting a meeting

Great news! Your boss asked you to host a meeting with some important clients. But how? Here are some tips.

Before

- **Choose the app.** See the app section above
- **Decide the agenda and structure.** Is this a formal meeting or more of an informal discussion? How long will it be? What items need to be discussed? Who will be speaking or presenting? How long will each speaker have? Will you share the agenda ahead of time?
- **Send meeting invitations with clear instructions.** Make sure you invite all speakers and participants well in advance of your meeting. Invite the audience as soon as possible too. Send reminders a week before, and the day before. Include the meeting link, instructions on how to connect, and offer help to anyone who needs it.
- **Plan and practice.** If possible, get a colleague to act as co-host. Decide who will admit people, start the recording, take notes, watch the time, watch the chat, show visuals, share polls, create breakout rooms, manage tech problems, etc. Whether or not you have a co-host, do a practice a day or two before the event.

During

- **Start the meeting.** As the host, you'll start the meeting at least 5 minutes early. Wait 2-5 minutes after the official start time to allow for late arrivals.
- **Welcome the group.** Warmly welcome everyone, introducing yourself and any guests that attendees may not know. In smaller meetings, you may introduce all of the attendees.
- **Provide agenda and norms.** Remind everyone to stay muted unless speaking. Do you want to invite people to comment and ask questions during your presentation, or should they wait until the end? Do you want questions asked verbally or in the chat?
- **Keep it as brief as possible.** Online meetings are tiring so be efficient and respectful of everyone's time and energy.
- **Take notes.** You or your colleague can take notes during the meeting, or you can write a brief recap immediately after.

After

- **Thank and summarize.** Send the guests and attendees a thank you and brief summary of the meeting. Include next steps, action items or information on the next meeting

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PRO TIP

Tech problems happen. No matter how prepared we are, sometimes things just don't work.

Don't panic! If the problem is minor, just keep going. If it's major, stop and address the issue. Thank everyone for their patience.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=84#h5p-16

3.4 CONNECTING THROUGH STORYTELLING

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Explain the importance of incorporating story in presentations
- Describe the effects when hormones are induced through storytelling
- Describe the structure of an effective story

We are bound together by family stories, creation stories, and cultural stories. The stories you share with your family or your sports team or your co-workers create your shared identity. As Jimmy Neil Smith said, "We are all storytellers. We all live in a network of stories. There isn't a stronger connection between people than storytelling" (as cited by Van West, 2018, para. 1).

> **"[W]e all ache for stories because we ache for connection. We all crave community, and it is stories, once shared, that bond us."**
>
> Richard Van Camp, *Gather: On the joy of storytelling,* p. 17

As a business communicator, you can use the power of story to build a connection with your audience. In his 17-minute presentation, David JP Phillips explains how you can use storytelling to trigger audience hormones and stir the feelings you would like to create:

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=86#oembed-1

(Direct link to The Magical Science of Storytelling TEDX Talk by David JP Phillips video)

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=86#h5p-17

The following slides discuss the common structures of stories in Western, non-Indigenous cultures. As you work through the slides you will craft a story and then think about its narrative flow.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=86#h5p-18

Direct link to embedded video in Slide 7: https://www.youtube.com/watch?v=gHGDN9-oFJE)

Remember the value of storytelling as you prepare for your next interview or presentation. Stories engage your listeners and create a bond. An interviewer may not remember your summer job position and responsibilities, but they will likely remember the story you tell about your efforts with the first-time, homesick camper or the client you delighted with improvements in lawn care. You have a story to tell.

STORYTELLING EXERCISES

1. Richard Van Camp (2021) says, “It’s through stories that we’ve come to know each other. We trust each other because we’ve trusted each other with our stories. We know each other through our stories. Storytelling = connection = community = joy and comfort = health and survival” (p. 22).

Sharing stories develops our relationships. We need to tell them and to hear them. Van Camp says he is a good storyteller because he is a good listener. For years he drove a Handi-Bus for Elders in his hometown of Thebacha (Fort Smith). As he drove the Elders to wherever they wanted to go, he listened and then later recorded their stories. To be an active, engaged listener, Van Camp recommends listening without interrupting and looking at the eyes, face, and hands of the storyteller as they speak. And, he says, *always*, put your phone down.

Use one of the following prompts Van Camp offers in *Gather* (pp. 163-164) to tell your group a story, and listen as your group members share theirs.

My biggest wish for my family is that we ______, and here's why______.
The funniest thing that happened to me this year is the time ______.
I can prove that the world is magic with this story: ______
I was given my name because ______.
I want to be remembered for ______.

2. Because stories are a way to make a connection, it is no surprise that companies often ask behavioural questions in interviews to determine fit with their organization. Behavioural questions ask you to share a story that illustrates a characteristic, for example, initiative, problem-solving, analytical skill, conflict negotiation, or teamwork. Use specific examples in your story, and even when the story asks you to reveal a weakness or mistake, focus on a happy ending with what you learned or were able to achieve. The best way to structure a story in response to a behavioural question is the STAR technique:

S ituation (explain the context or background information for your story; for example, you might need to describe your previous place of employment and your role there)
T ask (describe your responsibility or the problem you were tasked to solve)
A ction (explain what action you took to meet your responsibility or to solve the problem)
R esult (describe what happened as a result of your actions)Telling the result is especially important since without demonstrating how your success was achieved and measured (or how you plan to be successful in the future), your story lacks a satisfying conclusion.

Apply the STAR technique as you practice answering these common interview questions:

a. Tell me about a time when you successfully achieved a goal.
b. Describe a time when you had multiple competing deadlines and how you prioritized the tasks.
c. Tell me about a time when you were on a team that worked exceptionally well together.
d. Describe how you have handled a conflict with a co-worker.
e. Tell me about a mistake you have made and your efforts to correct the error.
f. Explain what equity, diversity, and inclusion mean to you. Provide an example of how you have applied EDI principles in your work or school life.
g. Describe a time when you used creativity to solve a problem.
h. Tell me about a time when you showed initiative.
i. Tell me about a time when you had to choose between a personal goal and a professional goal.
j. Tell me about a time when someone did not respond to your request for information or materials needed to complete a task. What did you do?

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3.5 ACKNOWLEDGMENTS OF INDIGENOUS PEOPLE AND LAND

LINDA MACDONALD; KAYLER MUTYABULE; AND JOSHUA TOUW

Learning Objectives

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

- identify the Native Land on which you are living and attending university
- explain the significance of the Truth and Reconciliation Committee (TRC) Report for Canada and Canadian business
- define your role as a citizen, permanent resident, or international student in Reconciliation
- create a land acknowledgment
- incorporate techniques to establish credibility and trust with Indigenous and non-Indigenous audience members.

The focus of this book is the developing and maintaining of business relationships through verbal and written communication. Our desire to create positive relationships and trust can be established in part through the sincere and authentic delivery of a land acknowledgment.

You may be called upon to deliver a land acknowledgement at an event, meeting, or ceremony. Your instructor may have delivered a Land Acknowledgment at the start of your university course, or you may have heard an acknowledgment at a sports event or theatre production. These acknowledgments recognize the First Nations, Métis, and/or Inuit territories from which the acknowledgment is delivered. They are essential for establishing respectful and reciprocal relations with the people on whose land we conduct economic activity. They also remind us that we are obligated to fulfill our agreements with Indigenous people; in much of Atlantic Canada, these covenants are laid out in the Treaties of Peace and Friendship.

This video, produced in the United States, explains the importance of land acknowledgments.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=89#oembed-1

(Direct link to #HonourNativeLand by the US Department of Arts and Culture video)

This chapter discusses why it is important that we acknowledge Indigenous peoples and territory, what you should do in preparation for delivering or writing an acknowledgment, and the steps to follow in creating a meaningful statement.

WHY ACKNOWLEDGE TERRITORY?

In 2008, the Truth and Reconciliation Committee (TRC) began collecting the experiences and impacts of residential schools on Indigenous individuals and communities. Their 2015 final report details the loss of identity and culture resulting from the separation of children from their families. The report states,

> The Canadian government pursued this policy of cultural genocide because it wished to divest itself of its legal and financial obligations to Aboriginal people and gain control over their land and resources. If every Aboriginal person had been "absorbed into the body politic," there would be no reserves, no Treaties, and no Aboriginal rights.

To address the long history of physical and cultural genocide, the TRC created 94 "Calls to Action". Call to Action #92 addresses the responsibility of Business. The corporate sector is asked to

> i. Commit to meaningful consultation, building respectful relationships, and obtaining the free, prior, and informed consent of Indigenous peoples before proceeding with economic development projects.
>
> ii. Ensure that Aboriginal peoples have equitable access to jobs, training, and education opportunities in the corporate sector, and that Aboriginal communities gain long-term sustainable benefits from economic development projects.
>
> iii. Provide education for management and staff on the history of Aboriginal peoples, including the history and legacy of residential schools, the United Nations Declaration on the Rights of Indigenous Peoples, Treaties and Aboriginal rights, Indigenous law, and Aboriginal–Crown relations. This will require skills based training in intercultural competency, conflict resolution, human rights, and anti-racism. (Truth and Reconciliation Commission of Canada, 2015)
>
> [Note. The use of the word *Aboriginal* is no longer considered acceptable in reference to First Nations, Métis, or Inuit peoples.]

Presenting a Land Acknowledgment works toward "building respectful relationships" and furthers your training in intercultural competency and anti-racism.

In summary, we acknowledge territory to

- celebrate our Indigenous communities and their stewardship of the land;
- accept our colonial past and the impact of colonialism;

- recognize that we have obligations to fulfill as outlined in the Treaties for our region;
- demonstrate awareness of Indigenous land rights; and
- move toward establishing respectful relationships.

BEFORE CREATING YOUR ACKNOWLEDGMENT

Before writing a Land Acknowledgment, build your knowledge about the land and its Indigenous peoples, look at issues with land acknowledgments, and consider actions you might take toward Reconciliation.

Explore the Land You Are on and Its Indigenous Peoples.

Begin your exploration by discovering where you are. Go to Native-Land.ca. Enter the location for your presentation. You may also wish to look at the territorial map of your birthplace or other places of significance to you.

Image by Native-land.ca. Used with permission.

Learn about the history of the territory and its people. If you are in Atlantic Canada, you can explore the Mi'kmaq History Month site. This site contains information about Mi'kmaw history and experience through links to treaties, videos, and posters. Exploring the site provides an overview of the Mi'kmaw people and their connection to the earth. As business communicators, it is essential to know your audience and understand their world view.

In your acknowledgment, you can show respect by referring to the specific Indigenous peoples from the land you are on and the name of the territory. In a speech, pronounce these names correctly and use the correct grammatical form.

- In much of Atlantic Canada, acknowledge the land as *Mi'kma'ki* , pronounced "Mi' gma'gi" ("The university is located in Mi'kma'ki").
- Use the word *Mi'kmaq* to refer to these Indigenous people in the plural ("The relationship between settlers and the Mi'kmaq is decreed in the Peace and Friendship Treaties").
- Use *Mi'kmaw* to refer to a person in the singular or as an adjective ("The Mi'kmaw Nation retains rights to its unceded land").

You may wish to greet your audience by saying hello in the Indigenous language of your territory. In Mi'kma'qi this word is kwe'. Only Indigenous people should *welcome* others onto their territory.

Explore Issues with Acknowledgments

Land Acknowledgments can be meaningful celebrations of Indigenous people and lands. Often, however, these acknowledgments fail to demonstrate movement toward Reconciliation because they are

- formulaic and scripted rather than personal;
- institutional requirements rather than authentic reflections; or,
- disconnected from the event or meeting that it precedes.

The following video from the *Baroness von Sketch Show* illustrates the problem created when satisfying institutional obligations produces inauthentic results.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=89#oembed-2

(Direct link to Land Acknowledgement on the Baroness von Sketch Show video)

Consider Actions You Can Take

To be meaningful and sincere, Land Acknowledgments should state what actions you will take toward Reconciliation. The Native Governance Center (USA) suggests that the focus of acknowledgments should be on "the all-important action steps for supporting Indigenous communities": "[W]e encourage you to commit the bulk of your writing time to outlining the concrete ways that you plan to support Indigenous communities into the future. Otherwise, your land acknowledgement statement simply becomes yet another form of '**optical allyship**.'" Latham Thomas [2glowmaven] (2008) defines optical allyship as allyship that platforms the "ally" at the surface level but "doesn't go beneath the surface and is not aimed at breaking away from the systems of power that oppress."

Think about actions you can take toward Reconciliation. This commitment to action indicates that your acknowledgment is not merely performative but a sincerely motivated effort to dismantle colonialistic practices and develop just and mutual relationships with Indigenous people. For example, you might commit to

- supporting Indigenous business,
- learning about Indigenous peoples in your region,
- fostering business relationships with Indigenous suppliers,
- exposing business practices that devalue the Indigenous community and exploit people and the planet for profit,
- identifying methods of systematically oppressing Indigenous people in business dealings and eliminating barriers,
- recognizing the historic economic exclusion of Indigenous people and working toward eliminating inequalities, or
- learning about sustainable economic development.

A genuinely expressed statement of action demonstrates your desire to establish positive, authentic relationships with both your Indigenous and non-Indigenous audiences.

CREATING YOUR ACKNOWLEDGMENT

Your Land Acknowledgment should be a personal statement, unique to you and the place and time in which you deliver it. In your statement you should do the following:

1. **Name the Indigenous territory** on which your meeting or event takes place, and, if you are not residing in that location, the territory on which you are living. Also **name the Indigenous people** who live in your region and have acted as continuous stewards of the land, the water, and all its plants and animals.
2. **Explain who you are, why you came to this land, and what treaty(s) establish your relationship with the land and its people.** Are you here as a student? A settler? Have you immigrated to Canada? Why are you thankful to be here? What are the treaties or agreements that our ancestors committed to?
3. **State the actions you might take toward further Reconciliation**.
4. **Connect the acknowledgment to the purpose of the meeting.** Think about the purpose of your event or meeting. Consider the relevance of the Land Acknowledgment to this purpose.

Examples

Kwe'. Today we meet on the land of the Mi'kmaw Nation to discuss the environmental impact of development on the WIlliam's Lake watershed. As an immigrant to Canada and a settler on Mi'kma'ki, I am grateful to call this place my home. I recognize that in referring to this place as "home", I am responsible for making sure that I understand my obligations under the Treaties of Peace and Friendship and for following the example of the Mi'kmaq in maintaining the health and well-being of all of its people, land, waters, plants, and creatures. I commit to this work and to ongoing consultation with the Mi'kmaq before moving forward with this development. *Wela'lin* [Thank you].

Shé kon. Greetings to those watching today's game. We come to you live from BMO Field in Tkaronto, part of the traditional territory of the Huron-Wendat, Haudenosaunee, and the Anishinaabe peoples. Tkaronto consists of ceded lands covered in the Toronto Treaty 13 and the Williams Treaties, but also unceded lands that are contested today. It is our duty to be stewards of this land, treating it and the Indigenous peoples surrounding us with the respect and dignity they deserve. Together with Indigenous Sport & Wellness Ontario, we commit to providing sport, recreational, and physical activities that promote well-being in Indigenous communities. [Student-contributed example]

Kwe' and welcome to you all. It is with great excitement that we are officially kicking off the 2021 Orientation week festivities. What an honour it is to stand together in Mi'kma'ki, the traditional and unceded territory of the Mi'kmaq. Being born and raised in a formally colonized country in East Africa, and feeling like what rightfully belonged to my people was once taken from them, makes it dear to my heart to show respect and honour to all land and its Indigenous people. I am devoted to learning more about Indigenous people and the challenges they face and to working toward eliminating inequalities. [Student-contributed example]

DELIVER THE ACKNOWLEDGMENT

Deliver the acknowledgment of Indigenous peoples and land extemporaneously– without a script, notes, or memorization. By delivering your message extemporaneously, you demonstrate your authenticity and heartfelt commitment. Your audience will see you as genuine and trustworthy, essential qualities for building lasting relationships.

CONCLUSION

A Land Acknowledgment at the start of a presentation is one way to demonstrate a commitment to the Truth and Reconciliation (TRC) Calls to Action and the United Nations Declaration on the Rights of Indigenous Peoples. It is not, however, the end of your responsibility in working toward Reconciliation. Reconciliation is an ongoing process. Nor is it the end of your organization's responsibility. Businesses further Reconciliation by building relationships with Indigenous communities, consumers and suppliers; contributing to economic developments that benefit Indigenous peoples; training employees for intercultural competency and appropriate conflict resolution; and developing and employing Indigenous talent. As future business leaders, you have an essential role in moving Canada toward fair and respectful business practices.

DISCUSSION QUESTIONS

1. What is the purpose of a Land Acknowledgment?
2. As an InFocus APTN 2019 article states, some people question whether Land Acknowledgments are "useful in reconciliation or simply superficial platitudes meant to give the illusion of honour and respect for Indigenous land and nations." What techniques can you use to convey sincerity in your delivery of a land acknowledgment?
3. Effective Land Acknowledgments do not simply announce the territory of Indigenous peoples and the treaties that establish our relationship. The Land Acknowledgment should state the action(s) that will be taken toward Reconciliation. What actions can you take as residents of this Indigenous land and as future business leaders?

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3.6 STRUCTURING YOUR PRESENTATION

LUCINDA ATWOOD; CHRISTIAN WESTIN; [AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER]; AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Explain how to integrate a Land Acknowledgment
- Describe various techniques for creating a "grabber" or "hook"
- Describe various methods of organizing the body of the speech
- Describe the elements to include in the ending of the speech

Speeches can be organized in many different ways, and one way is no "better" or "more correct" than the others. The choice of an organizing principle, or a core assumption around which everything else is arranged, depends on the subject matter, the rhetorical situation, and many other factors, including your preference as speaker.

If your speech is delivered in a public forum or at an event, particularly if it is a gathering at which you represent an industry with a strong connection to the land and nature, you should begin with a Land Acknowledgment, as addressed in Chapter 3.5. The Land Acknowledgment should not be tacked on to the start of the speech; it should flow into the content. Incorporating the Land Acknowledgement smoothly and effectively honours the relationship with Indigenous peoples and demonstrates that working toward Reconciliation is an integral part of our individual and corporate missions.

PRESENTATION STRUCTURE

The simple structure outlined below is adaptable to most topics. The presentation begins with a "hook", a claim, and an overview of key points that will be addressed. The main part of the speech follows with two to five main points; and concludes with a summary and, in a persuasive speech, a call to action.

Introduction

In the Introduction of your presentation, you'll capture the audience's attention, tell them who you are, state the main point of your presentation, and provide a preview.

- **Land Acknowledgment** If appropriate for your event or purpose, begin with a land acknowledgment.
- **Grabber/hook** A very brief and interesting statement or question that grabs the audience's attention. See Grabber Types below for more details.
- **Self-introduction** (Place before or after the grabber) Tell the audience your name and credentials. For example: *I'm Minh and I've been a professional presenter for 10 years.*
- **Thesis** The main point or argument of your presentation. Be brief and precise, not general or vague. For example: *I'm going to show you how practicing your presentation 10 times will improve your grade by 20%.*
- **Overview of main points** Briefly outline the main points that you'll cover in your presentation. To help your audience, list these in same order that you'll deliver them later on. For example: *First, we'll talk about what makes presentations great, then I'll share some data on how practice affects your confidence and performance, and finally we'll look at how to practice.*

Grabber types

Remember that the grabber's job is *grabbing* the audience's attention, so it must be surprising, fascinating or intriguing. It must also be related to your presentation's topic. Some descriptions and examples are presented here:

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https://pressbooks.nscc.ca/profsalescommunication/?p=91#h5p-19

You can also mix and match grabbers. For example, you could show an image and ask the audience to guess what it is.

The length of your grabber is relative to your total presentation time. For a 2-minute presentation, it should be quite brief – maybe one sentence. For a 16-minute team presentation, a 45-60 second grabber would be appropriate.

Body

In this part of your presentation, you'll deliver detailed information. Depending on the length of the presentation and your purpose, you might have two to five points in the body.

- **Key point 1** A major point that supports your thesis and may have supporting sub-points
- **Key point 2** Another major point that supports your thesis and may have supporting sub-

points

- **Key point 3** The final major point that supports your thesis and may have supporting sub-points

Your points can be arranged in a variety of ways. In her TED Talk *The Secret Structure of Great Talks* and her *Harvard Business Review* article titled "Structure your presentation like a story" (click here for direct link to her article), Nancy Duarte advocates organizing a presentation according to what *is* and what *could be*. Before reading on, take a moment to read the Duarte article, then check your knowledge.

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https://pressbooks.nscc.ca/profsalescommunication/?p=91#h5p-20

Other ways to organize the body of your presentation are presented in Table 3.5.1. The center column explains how the principle works, and the right column provides an applied example based on a sample speech about the United States' First Transcontinental Railroad. For example, using a biographical organizing principle, you might describe the journey of the Lewis and Clark expedition in 1804, Lincoln's signing of the Pacific Railroad Act in 1862, and the completion of the first Transcontinental Express train trip in 1876. As another example, using a spatial organizing principle, you might describe the mechanics of how a steam locomotive engine works to turn the train wheels, which move on a track to travel across distances.

As you read each organizational structure, consider how the main points and subheadings change or adapt to meet each pattern.

Table 3.6.1

Sample Organizing Principles for a Speech

Organizing Principle	**Explanation**	**Applied Example**
1. Time (Chronological)	Structuring your speech by time shows a series of events or steps in a process, which typically has a beginning, middle, and end. “Once upon a time stories” follow a chronological pattern.	Before the First Transcontinental Railroad, the events that led to its construction, and its impact on early America…
2. Comparison	Structuring your speech by comparison focuses on the similarities and/or differences between points or concepts.	A comparison of pre– and post–First Transcontinental Railroad North America, showing how health and life expectancy remained the same.
3. Contrast	Structure your speech by using contrasting points highlights the differences between items and concepts.	A contrast of pre– and post–First Transcontinental Railroad North America, by shipping times, time it took to communicate via letter, or how long it took to move out West.
4. Cause and Effect	Structuring your speech by cause and effect establishes a relationship between two events or situations, making the connection clear.	The movement of people and goods out West grew considerably from 1750 to 1850. With the availability of a new and faster way to go West, people generally supported its construction.

Organizing Principle	Explanation	Applied Example
5. Problem and Solution	Structuring your speech by problem and solution means you state the problem and detail how it was solved. This approach is effective for persuasive speeches.	Manufacturers were producing better goods for less money at the start of the Industrial Revolution, but they lack a fast, effective method of getting their goods to growing markets. The First Transcontinental Railroad gave them speed, economy, and access to new markets.
6. Classification (Categorical)	Structuring your speech by classification establishes categories.	At the time the nation considered the First Transcontinental Railroad, there were three main types of transportation: by water, by horse, and by foot.
7. Biographical	Structuring your speech by biography means examining specific people as they relate to the central topic.	• 1804: Lewis and Clark travel 4,000 miles in over two years across America • 1862: President Lincoln signs the Pacific Railroad Act • 1876: The Transcontinental Express from New York arrives in San Francisco with a record-breaking time of 83 hours and 39 minutes • 2009: President Obama can cross America by plane in less than 5 hours
8. Space (Spatial)	Structuring your speech by space involves the parts of something and how they fit to form the whole.	A train uses a heat source to heat water, create stream, and turn a turbine, which moves a lever that causes a wheel to move on a track.
9. Ascending and Descending	Structuring your speech by ascending or descending order involves focusing on quantity and quality. One good story (quality) leads to the larger picture, or the reverse.	A day in the life of a traveler in 1800. Incremental developments in transportation to the present, expressed through statistics, graphs, maps and charts.
10. Psychological	It is also called "Monroe's Motivated Sequence" (Ayres, J. and Miller, J., 1994). Structuring your speech on the psychological aspects of the audience involves focusing on their inherent needs and wants. See Maslow and Shutz. The speaker calls *attention* to a *need*, then focuses on the satisfaction of the need, *visualization* of the solution, and ends with a proposed or historical *action*. This is useful for a persuasive speech.	When families in the year 1800 went out West, they rarely returned to see family and friends. The country as a whole was an extension of this distended family, separated by time and distance. The railroad brought families and the country together.
11. Elimination	Structuring your speech using the process of elimination involves outlining all the possibilities.	The First Transcontinental Railroad helped pave the way for the destruction of the Native American way of life in 1870. After examining treaties, relocation and reservations, loss of the buffalo, disease and war, the railroad can be accurately considered the catalyst for the end of an era.

Transitions

The structure of your presentation should be clear to your listeners at the start of the presentation and reinforced throughout with transitions. Transitions both connect to your thesis and indicate a shift to your next point.

As part of your introduction, you should make clear the structure of your points. For example,

> "Slack Desktop offers three time-saving benefits for our team collaborations."
> "First, I will discuss the current inefficiencies in our collaborations and then explain how Slack Desktop can resolve these problems."

"Slack Desktop's built-in notification system, keyboard shortcuts, and convenience in switching between workspaces are advantages for team collaborations."

Provide a transition as you move from the introduction to the first point. For example,

"The first advantage for our teams in using Slack Desktop…"
"First, I will provide an overview of Slack's capabilities before addressing the two features that are most compelling for our teams…"
"Let's begin with the built-in notification system…"

As you move to the second and third points, you can reinforce the structure of the presentation for your listener by stating where you have been and where you are going. For example,

"We have covered the benefits of the notification system and the range of keyboard shortcuts and will now discuss the greatest benefit for our work– the simplicity in moving between teams."
"A final benefit of Slack Desktop for collaborations is the ease in switching between teams."
"Now that I have demonstrated the problems with the current system, I will demonstrate the solutions to these problems with Slack."
"It is clear that the notifications systems and keyboard shortcuts are time-saving features, but the greatest time-saving feature is the ease and convenience in switching between teams."
"Although Slack has several beneficial features, team collaborations in our company may be better facilitated through Chanty."
"Just as keyboard shortcuts provide added convenience, so too does the notification system."

Finally, transition to the conclusion:

"In summary, Slack has indisputable advantages."
"In conclusion,.."
"What I would most like you to take from this presentation is…"

Transitions connect your points and ensure the audience follows you. The audience will clearly see where you have been and where you are going next. Practice your transitions so that the content flows naturally. As we will discuss in Chapter 3.12, moving as you transition between points can help you remember the order of points as well as engage your audience.

Conclusion

At the end of your presentations, you'll remind the audience of what you told them, and tell them what to do next.

- **Summary of main points** (can be merged with your conclusion) Clearly restate your three main points in the same order you delivered them. It's the same as your overview but in past tense. *First, I described what makes presentations great, then I shared data on how practice affects confidence and performance, and finally we looked at how to practice.*
- **Conclusion** Restate your thesis in past tense. For example: *I'm showed you that practicing your presentation 10 times will improve your grade by 20%.*

- **Call to action** Give your audience clear, active and compelling direction, based on what you told them. For example: *Practice your presentations ten times and start collecting those A-plusses!*

CHECK YOUR KNOWLEDGE

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Now that you have some ideas of how you might structure your presentation, move on to creating a storyboard, the subject of the next chapter.

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3.7 CREATING A STORYBOARD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Outline the benefits of creating a storyboard
- Identify the steps in moving from idea to slide deck creation

Once you have some ideas about how you might structure your extemporaneous presentation, develop a storyboard and an outline. A strong direction for your presentation will help you feel confident.

STORYBOARDS

Before starting on your slides or finalizing an outline, create a storyboard. The storyboard helps you organize and plan your slide deck, including the order that slides will appear and what text or images you might include on each slide.

One option is to use sticky notes to create your storyboard, with one sticky note representing one slide. Sticky notes help you organize your slides because they are so easy to move around, edit, and delete.

Anuj Malhotra's article "How to storyboard your presentation for the best results (Product launch case study)" explains the value of storyboarding and illustrates the process of moving from a storyboard with post-it notes to final slide design. Take a few minutes to look through this article.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=94#h5p-22

When you finalize your presentation form, you will move on to create your slides and a speech outline, the subjects of the next chapter. You may find that you have to circle back to storyboarding as you work through creating your presentation. You may discover that you lack sufficient credible evidence and need to eliminate a point or that your points move away from what the audience needs to know. You may discover later in the process that the speech exceeds the time limit and needs to be cut down. The process of crafting an effective speech is iterative, which means that you may need to repeat the sequence of steps until the presentation achieves your desired result.

3.8 CREATING SLIDES FOR PRESENTATIONS

LUCINDA ATWOOD; CHRISTIAN WESTIN; AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Create an organized slide deck for a presentation
- Identify best practices in selecting titles and text design
- Select visual design elements
- Provide an appropriate source citation for images from the Internet
- Determine how to select an appropriate graph, chart, or visual for storytelling

When making slides, make sure you consider these five elements: organization, titles and text, visual design, content, and user experience.

ORGANIZATION

Your slide deck must be organized to match the order of your presentation. Make sure that information is presented in a logical way. For example, if you are talking about something that happens in a sequence, make sure it is in the correct order in your slides. Present information based on its importance. The size of text and list format of key points and sub-points should be consistent with their importance.

TITLES AND TEXT

The appearance of your titles and text can reinforce your professionalism (your *ethos*).

Consistency Throughout your slide deck, titles and text should be consistent in heading and text size, bullet style, hierarchy of points, and formatting. If the style does change, it should be an intentional design choice that reflects the content. Be especially careful with team projects – it's easy to lose consistency when more than one person creates the slides.

Brevity Your slides are not a script. If you include too much information on them, your audience will be reading, not listening to you. Slides should reinforce your key points, highlighting only the most important information. Share anecdotes, smaller details and extra information verbally.

Pro Tip

Two great methods keep slides brief: The **1-6-6 Method** recommends that each slide have a maximum of 1 idea, 6 bullet points, and 6 words per bullet. The **1-3-5 Method** is similar: It suggests 1 idea, 3 bullet points and 5 words per bullet, per slide.

Font style Your audience might have less than perfect vision or a small device, so make the type easy to read. Your slide should have short blocks of text. Brief text is easier to read in a sans serif font (see Chapter 2.3 for a discussion of typefaces). Highway signs, for example, are designed for small amounts of text to be read at a distance. In general, you can use a simple sans serif font like Arial or Calibri for slides that will be viewed online or through a projector.

However, you may want to add visual interest with font pairing. Limit the number of fonts you use to no more than two, one for the headings and one for the main bodies of text. An internet search of effective font pairings for presentation slides can give you some ideas (for example, see Canva). Font pairings can be one of four types, as shown in the images below along with examples of each type of pairing. Choose the pairing and the typefaces best suited to your purpose, audience, and context.

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The font size depends on the size of the screen and the distance of the audience from it. If you are using a font size smaller than 32, test your slides to make sure text is visible from the back of the room or an a small device.

Use high-contrast colours for text, such as black on white, or white on navy blue. If you're placing text on an image, use a solid background colour in the text box.

You can further differentiate text with bold or italics. Remember, though, that too much emphasis is no emphasis at all.

Spelling and grammar Checking your spelling and grammar. (Most presentation apps include spell-check tools.) Typos and grammar errors make you look sloppy and unprofessional (diminishing your *ethos*).

Animations You can use the app's animation tools to move objects and text on, off, or around a slide. You've probably seen slides with bullet points that appear one at a time. Animations are useful when you want to gradually reveal information, for example if you want the audience to focus on one point at a time or when you want to ask a question before showing the answer.

Limit the number of animations you use, and avoid whimsical or unnecessary ones – they can make your slides annoying and unprofessional.

Transitions You can use transitions, like fade-in or fade-out, when you're moving from one slide to the next. To avoid distracting your audience, don't use too many different types of transitions, and avoid overly dramatic transitions. Just like animations, a little goes a long way.

Visual design

You do not have to be a designer to make professional slides; most apps include professionally-designed templates, or you can start with a blank slide. Whichever you choose, make sure the visual design supports your content and strengthens your message. Slides should relate to each other visually: Colours, layout, text and images should be consistent.

Consistency All slides should have a consistent design as though they were created by one person, not pieced together from multiple sources. If the design changes within the slide deck, the change should be an intentional design choice that reflects the purpose of the presentation. Be especially careful during team projects; it's easy to lose consistency when more than one person creates the slides.

Alignment Keep slides looking clean and professional by aligning various text or image elements. For example, text is almost always left-aligned (except captions and titles). Space text and images so they're balanced and visually pleasing. PowerPoint shows alignment markings to help with this.

Branding Branded elements make your slides look professional. You can use your brand's colours and logo on the title page, and/or at the top or footer of each slide. Your branding may include fonts, text size and colour. Whatever you choose, make sure all text is easy to read and not distracting.

Images Human brains love images. Include images in your slides to add interest and explain key points. Make sure every image is high quality, high resolution, relevant and appropriate, large enough to be easily seen from afar, not stretched or distorted, and free of watermarks. (More about watermarks below).

Single images are generally better than collages because you want slides to be uncluttered. No matter how cute they are, *don't* include images that are unprofessional or unrelated to your subject – such as emojis, minion pictures, and bad clip art.

Charts and graphs Well-displayed information can enhance your audience's understanding and help to convince them that you are a professional. Charts and graphs are fantastic ways to show data, describe relationships, and help your audience understand a key point. Make sure the labels and titles are large enough to be easily read, and remove unnecessary details; you can verbally explain details and background information. If your presentation includes handouts, you can show the basic chart or graph on screen, and add a more detailed version in the handout. See "Which chart, or visual should I use? " below for examples and additional guidelines.

Content

Complete Your presentation should include at least one slide for each key point. Make sure that only the most important information of your presentation is on your slides.

Makes sense Information presented is well researched.

Fits audience Assume that your audience is smart like you, but doesn't have specialist knowledge. Take the time to explain anything that the majority of people might not know.

Citations and references For facts, quotes, or other statistics, you may want to include your source on the slide, especially if it adds credibility. Otherwise, sources (including for images) are listed in both the notes section and in a list of sources at the end of your presentation.

Authorship Include your full name at the start of your slides. You may want to include your name and contact information on your last slide.

Engages the left and right brain Audience members engage and remember better when you engage the "left brain" – logic, facts, science, numbers, and hard data – as well as the "right brain" – emotion, colour, artistic and sensory information like music, videos, and other media.

Audience experience

This element is a bit different from the ones above because it focuses on the live integration of your slides and your presentation.

Slides enhance the presentation Remember that you are the star of the show, and your slides are there to support your live delivery. For this reason it is important to ensure that you don't use the slides as a teleprompter – always practice and know your entire presentation and slideshow thoroughly. Avoid turning your back to the audience to look at the slide while speaking.

Number of slides is reasonable Practice delivering your presentation to ensure you're not rushing through too many slides or forcing the audience to stare a the same slide for too long.

Agenda / overview Longer or more complex presentations (for example, case study presentations) often include an agenda or overview slide. Shorter presentations typically don't use them.

Animations and transitions executed When practicing your presentation, remember which slides have animations or transitions, and practice advancing your slides at the right time. Sometimes presenters get caught up in their content and forget to move the slides ahead.

USING OTHER PEOPLE'S IMAGES

You can use your own images in your presentations. You can also use downloaded images, but be careful to use copyright-free images, and credit them properly, even if no attribution is required for use.

Many images that you see online are copyrighted, meaning you can't use them without the creator's permission. A lot of those images have watermarks to make sure people don't use them, or pay to use them. Don't use watermarked images—it's illegal and unethical. A watermark looks like this:

Image courtesy Lucinda Atwood

Where to find images

Many high-quality images are freely available online. Sources include

- Creative Commons
- Pexels
- Unsplash
- Pixabay
- Flicker – Creative Commons license
- Google: Enter your search words and click *Search*. Then click *Images,* and then *Tools* (underneath the search bar). Then click *Usage Rights* and select *Creative Commons Licenses*.

How to give credit

Always give credit to the creators of anything you didn't create – including images, charts, graphs, video, audio and gifs. You don't need to credit anything you made yourself. Your authorship is implied as no source is provided.

Put image credits in the Notes section of the slide. Also list the credits on one slide at the end of the presentation.

Citations have three parts. Use the following citation form:

[Title of the Creative-Commons-licensed image] by **[Creator]** licensed under **[license type]**

Link to each of the three elements– title, creator, and license. For example, the following image should be cited as

DSC03194 – Peggy's Cove Lighthouse by Dennis Jarvis licensed under CC BY-SA 2.0

Some sites, like Unsplash, provide the appropriate source attribution for you when you download the image.

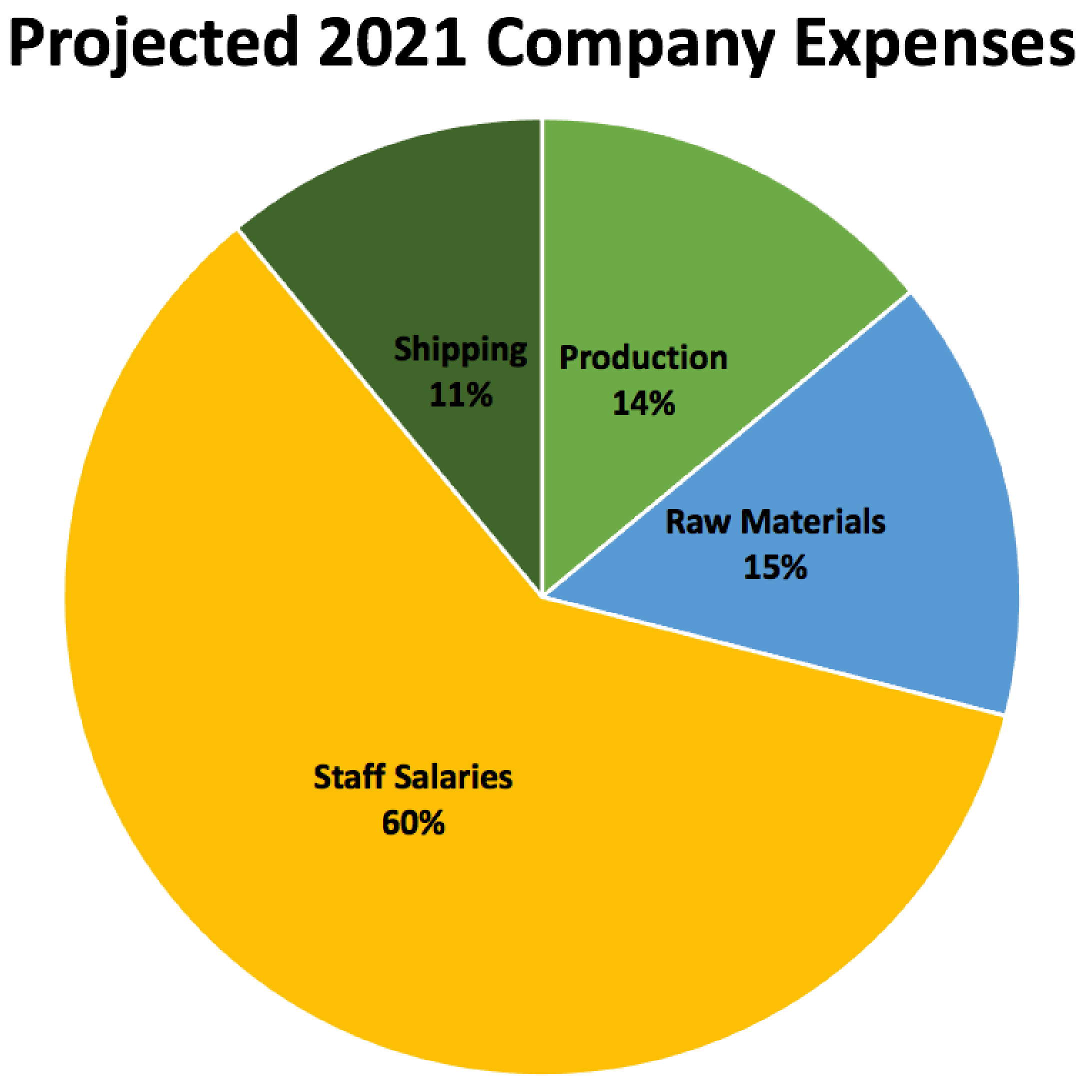
WHICH GRAPH, CHART, OR VISUAL SHOULD I USE?

You can easily make charts and graphs for your presentation, using Excel or Google Spreadsheets. Add the data to the spreadsheet, then decide which type of chart or graph to use.

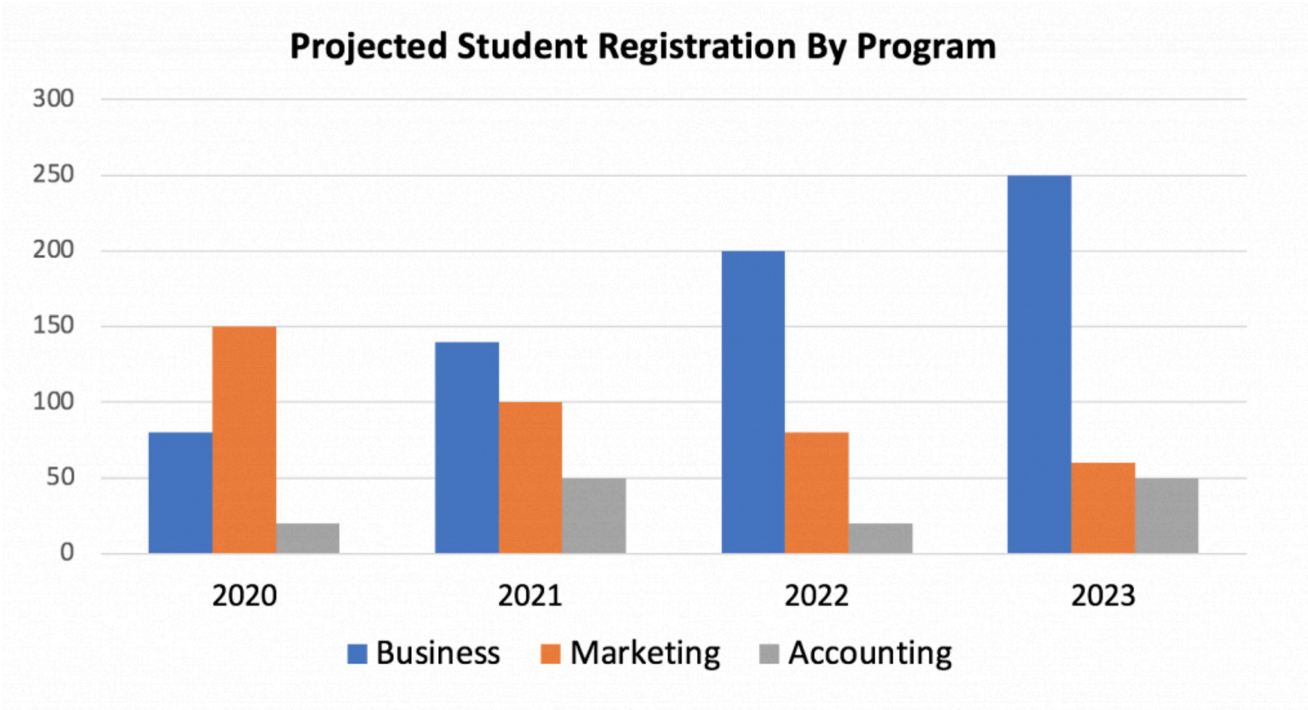
No matter what type you use, always include a title, clear labels, and high-contrast colours that are visible to all users. For example, many people can't see the difference between red and green, so avoid using them together.

The most common types are presented here:

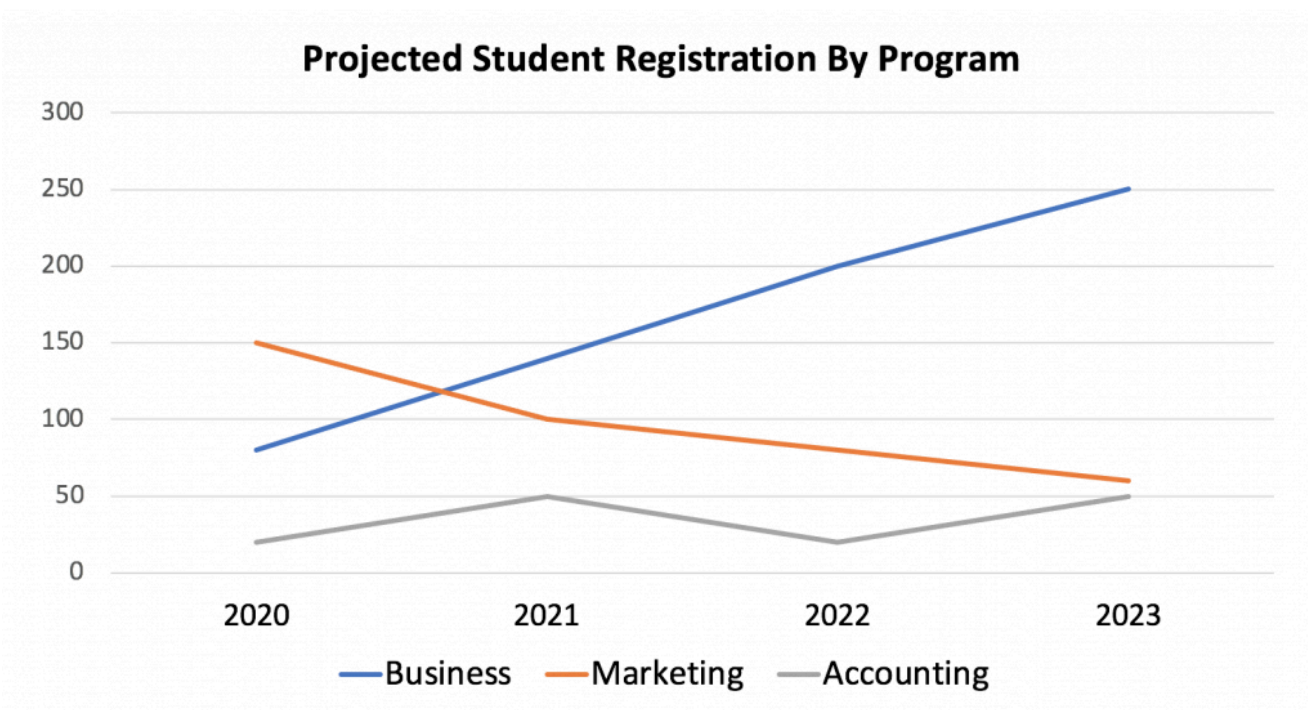
Pie charts show percentages – portions of a whole. The total segments should add up to 100% or a complete whole. Pie charts are excellent for showing relationships. In the example below we quickly see that Staff Salaries are a huge portion of the company expenses.



Bar graphs allow comparison between different values, and can show changes over time (if the difference in values are large). The horizontal and vertical axis must always be labelled. This graph shows that the number of Business students is expected to rise, while the number of Marketing students will decrease.



Line graphs show a trend or progress over time. They can show small changes over time better than a bar graph. Note that the example below shows the same data used in the chart above, but the line graph emphasizes the trend of business registrations growing, marketing registrations declining, and accounting registrations remaining low with a bit of fluctuation. This graph would be better if you wanted to focus on changes over time.



Heatmap charts use colour to convey the magnitude of certain values. Examples include a risk management heatmap showing low, medium, and high risk based on the likelihood and impact of various outcomes, or an atlas heatmap as displayed below. Because heatmaps depend only on colour – not shape or size – be very careful to use colours that all users can see.

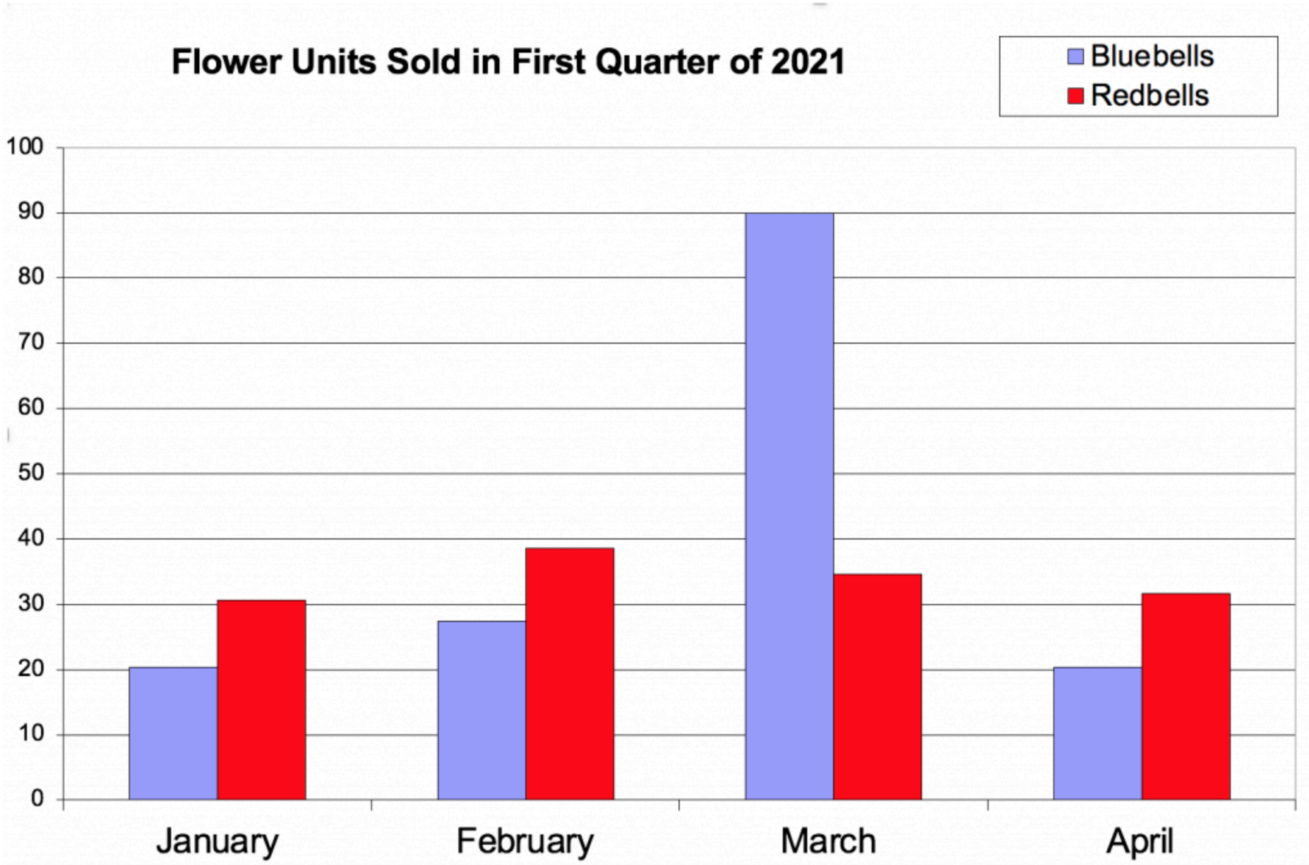
Which chart? An example

Imagine that our team is excited to share the success of our recent marketing campaign to promote bluebell flower sales during the month of March. Here are two ways we might display the data. Look at both and note your response: Which one is easier to understand? Which do you prefer to look at?

Example 1

	January	February	March	April
Bluebells	20.4	27.4	90	20.4
Redbells	30.6	38.6	34.6	31.6

Example 2



Example 1 is harder to read because it's not visual. There are many numbers, no hierarchy or colour, and the heavy lines compete with the content. It's not easy for the viewer to quickly understand the information. This example also lacks a title or legend (a description of what the data is conveying).

Example 2 shows the same information, but in a way that's easy to quickly understand. This version emphasizes the dramatic success of our marketing campaign, which boosted sales of bluebells during March. Also notice the inclusion of a title, legend, clear axis labels, and colour coding – all of which help the audience's understanding.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=104#h5p-24

3.9 OUTLINING YOUR PRESENTATION

Learning Objectives

By the end of this chapter, you should be able to

- Create an outline of your presentation

Once you have developed a storyboard for your presentation, develop your outline. An extemporaneous speech should be delivered without full memorization or notes. Memorize the introduction and the transitions and the order of your points, but not the content of these points. To establish credibility and to connect with an audience, know your content and speak naturally and with command of the material.

This outline template can be used to create your speech:

Title of Your Speech

Purpose: State your purpose for the presentation, for example "to inform my audience to…" or "to persuade audience to …"

I. **INTRODUCTION**. Write out, in complete sentences, the introduction. In a short presentation, the introduction may be just a few sentences. The Introduction should:

A. Engage the audience with a "grabber" or "hook";
B. State the thesis of your presentation; and
C. Preview the main points in the order you will present them.

Transition: Write out the transition to your first point in a complete sentence.

II. **BODY**. Refer to Chapter 3.6 and the Duarte model for presentation structure or Table 3.6.1, *Sample Organizing Principles for a Speech*. Use key words or phrases for your points and supporting evidence, not full sentences.

A. First point in key words or phrases
   1. Supporting evidence in key words or phrases
   2. Supporting evidence in key words or phrases

Transition: Write out the transition to the second point in a complete sentence.

B. Second point in key words or phrases
   1. Supporting evidence in key words or phrases
   2. Supporting evidence in key words or phrases

Continue with no more than three additional points. Write a full sentence transition between each point.

Transition: Write out the transition to the conclusion with a phrase or a complete sentence.

III. **CONCLUSION**. Write your conclusion in complete sentences. In a short presentation, this conclusion may be just two or three sentences.

A. Restate your thesis.
B. Summarize key points.
C. End with an actionable takeaway.

3.10 PRINCIPLES OF NONVERBAL COMMUNICATION

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVES

By tthe end of this chapter, you should be able to

- Identify and explain the principles of nonverbal communication.

Nonverbal communication is an important aspect of business communication, from interpersonal interactions to public presentations. Nonverbals are a dynamic, complex, and challenging aspect of communication.

When your audience first sees you, they begin to make judgments and predictions about you and your potential, just as an employer might do when you arrive for a job interview. If you are well dressed and every crease is ironed, your audience may notice your attention to detail. Wearing jeans with holes, a torn T-shirt, and a baseball cap would send a different message. Neither style of dress is "good" or "bad, but simply appropriate or inappropriate depending on the environment and context. Your skills as an effective business communicator will be called upon when you contemplate your appearance. As a speaker, your goal is to create common ground and reduce the distance between you and the audience. You want your appearance to help establish and reinforce your credibility.

Chances are you have had many experiences where words were misunderstood, or where the meaning of words was unclear. When it comes to nonverbal communication, meaning is even harder to discern. We can sometimes tell what people are communicating through their nonverbal communication, but there is no foolproof "dictionary" of how to interpret nonverbal messages. **Nonverbal communication** is the process of conveying a message without the use of words. It can include gestures and facial expressions, tone of voice, timing, posture and where you stand as you communicate. It can help or hinder the clear understanding of your message, but it doesn't reveal (and can even mask) what you are really thinking. Nonverbal communication is far from simple, and its complexity makes our study and our understanding a worthy but challenging goal.

In order to be a successful business communicator, you will need to continually learn about nonverbal communication and its impact on your interactions. Understanding the principles of non-verbal communication can help in understanding this impact.

NONVERBAL COMMUNICATION IS FLUID

In a speech, nonverbal communication is continuous in the sense that it is always occurring, and because it is so fluid, it can be hard to determine where one nonverbal message starts and another stops. Words can be easily identified and isolated, but if we try to single out a speaker's gestures, smile, or stance without looking at how they all come together in context, we may miss the point and draw the wrong conclusion. You need to be conscious of this aspect of public speaking because, to quote an old saying, "Actions speak louder than words." People often pay more attention to your nonverbal expressions than your words. As a result, nonverbal communication is a powerful way to contribute to (or detract from) your success in communicating your message to the audience. If your words claim that the audience should have confidence in a new product, but your body language communicates nervousness, the audience may doubt your claims.

NONVERBAL COMMUNICATION IS FAST

Let's pretend you are at your computer at work. You see that an e-mail has arrived, but you are right in the middle of tallying a spreadsheet with numbers that just don't add up. You see that the e-mail is from a coworker and you click on it. The subject line reads "pink slips." You could interpret this to mean a suggestion for a Halloween costume, but in the context of the workplace you may assume it means layoffs, and your body may reveal your alarm.

Your emotional response is immediate. Nonverbal communication gives our thoughts and feelings away before we are even aware of what we are thinking or how we feel. People may see and hear more than you ever anticipated. Your nonverbal communication includes both intentional and unintentional messages, but since it all happens so fast, the unintentional ones can contradict what you know you are supposed to say or how you are supposed to react.

NONVERBAL COMMUNICATION CAN ADD TO OR REPLACE VERBAL COMMUNICATION

People tend to pay more attention to how you say it than what you actually say. In presenting a speech, this statement is particularly true. We communicate non-verbally more than we engage in verbal communication and often use nonverbal expressions to add to, or even replace, words we might otherwise say. We use a nonverbal gesture called an illustrator to communicate our message effectively and reinforce our point. Your coworker Andrew may ask you, "Barney's Bar after work?" as he walks by, and you simply nod and say "yeah." Andrew may respond with a nonverbal gesture, called an **emblem or illustrator**, by signaling with the "OK" sign as he walks away.

In addition to illustrators, we also use **regulators**. Regulators are nonverbal messages that control, maintain or discourage interaction" (McLean, S., 2003). For example, if someone is telling you a message that is confusing or upsetting, you may hold up your hand, a commonly recognized regulator that asks the speaker to stop talking.

Let's say you are in a meeting presenting a speech that introduces your company's latest product. If your audience members nod their heads in agreement on important points and maintain good eye contact, it is a good sign. Non-verbally, they are using regulators encouraging you to continue with your presentation. In contrast, if they look away, tap their feet, and begin drawing in the margins of their notebook, these are regulators suggesting that you better think of a way to regain their interest or else wrap up your presentation quickly.

Affect displays are nonverbal communication that express emotions or feelings (McLean, S., 2003). An affect display that might accompany holding up your hand for silence would be to frown and shake your head from side to side. When you and Andrew are at Barney's Bar, smiling and waving at coworkers who arrive lets them know where you are seated and welcomes them.

Adaptors are displays of nonverbal communication that help you adapt to your environment and each context, helping you feel comfortable and secure" (McLean, S., 2003). A **self-adaptor** involves you meeting your need for security by adapting something about yourself in a way for which it was not designed or for no apparent purpose. Playing with your hair or repeatedly rubbing your hands together are examples of self-adaptive behaviours. Combing your hair would be an example of a purposeful action, unlike a self-adaptive behavior. An **object-adaptor** involves the use of an object in a way for which it was not designed. You may see audience members tapping their pencils, chewing on them, or playing with them, while ignoring you and your presentation. Or perhaps someone pulls out a comb and repeatedly rubs a thumbnail against the comb's teeth. They are using the comb or the pencil in a way other than its intended design, an object-adaptor that may communicate a lack of engagement or enthusiasm in your speech.

Intentional nonverbal communication can complement, repeat, replace, mask, or contradict what we say. When Andrew invited you to Barney's, you said, "Yeah" and nodded, complementing and repeating the message. You could have simply nodded, effectively replacing the "yes" with a nonverbal response. You could also have decided to say no, but did not want to hurt Andrew's feelings. Shaking your head "no" while pointing to your watch, communicating work and time issues, may mask your real thoughts or feelings. **Masking** involves the substitution of appropriate nonverbal communication for nonverbal communication you may want to display (McLean, S., 2003). Nonverbal messages that conflict with verbal communication can confuse the listener.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=109#h5p-25

NONVERBAL COMMUNICATION IS UNIVERSAL

Consider the many contexts in which interaction occurs during your day. In the morning, at work, after work, at home, with friends, with family, and our list could go on for quite awhile. Now consider the differences in nonverbal communication across these many contexts. When you are at work, do you jump up and down and say whatever you want? Why or why not? You may not engage in that behavior because of expectations at work, but the fact remains that from the moment you wake until you sleep, you are surrounded by nonverbal communication.

If you had been born in a different country to different parents your whole world would be quite different. Yet nonverbal communication would remain a universal constant. It may not look the same, or get used in the same way, but it will still be nonverbal communication in its many functions and displays.

NONVERBAL COMMUNICATION IS CONFUSING AND CONTEXTUAL

Nonverbal communication can be confusing. We need contextual clues to help us understand, or begin to understand, what a movement, gesture, or lack of display means. Then we have to figure it all out based on our prior knowledge (or lack thereof) of the person and hope to get it right. Talk about a challenge. Nonverbal communication is everywhere, and we all use it, but that doesn't make it simple or independent of when, where, why, or how we communicate.

NONVERBAL COMMUNICATION CAN BE INTENTIONAL OR UNINTENTIONAL

Suppose you are working as a salesclerk in a retail store, and a customer communicated frustration to you. Would the nonverbal aspects of your response be intentional or unintentional? Your job is to be pleasant and courteous at all times, yet your wrinkled eyebrows or wide eyes may have been unintentional. They clearly communicate your negative feelings at that moment. Restating your wish to be helpful and displaying nonverbal gestures may communicate "no big deal," but the stress of the moment is still "written" on your face.

Can we tell when people are intentionally or unintentionally communicating nonverbally? Ask ten people this question and compare their responses. You may be surprised. It is clearly a challenge to understand nonverbal communication in action. We often assign intentional motives to nonverbal communication when in fact their display is unintentional, and often hard to interpret.

NONVERBAL MESSAGES COMMUNICATE FEELINGS AND ATTITUDES

Steven Beebe, Susan Beebe, and Mark Redmond offer additional insights on interpersonal nonverbal communication. These authors show that you often react faster than you think. Your nonverbal responses communicate your initial reaction before you can process it through language or formulate an appropriate response. If your appropriate, spoken response doesn't match your nonverbal reaction, you may give away your true feelings and attitudes (Beebe, S., Beebe, S., and Redmond, M., 2002).

Albert Mehrabian asserts that we rarely communicate emotional messages through the spoken word. According to Mehrabian, 93 percent of the time we communicate our emotions nonverbally, with at least 55 percent associated with facial gestures. Vocal cues, body position and movement, and normative space between speaker and receiver can also be clues to feelings and attitudes (Mehrabian, A., 1972).

Is your first emotional response always an accurate and true representation of your feelings and attitudes, or does your emotional response change across time? Our emotional responses are changing all the time, and sometimes a moment of frustration or a flash of anger can signal to the receiver a feeling or emotion that existed for a moment, but has since passed. Their response to your communication will be based on that perception, even though you might already be over the issue. In this case, your spoken words may serve you well. You may need to articulate clearly that you were frustrated, but not anymore. The words spoken out loud can serve to clarify and invite additional discussion.

WE BELIEVE NONVERBAL COMMUNICATION MORE THAN VERBAL

Building on the example of responding to a situation with facial gestures associated with frustration before you even have time to think of an appropriate verbal response, let's ask the question: what would you believe, someone's actions or their words? According to William Seiler and Melissa Beall, most people tend to believe the nonverbal message over the verbal message.

Because we tend to believe the nonverbal over the verbal, you need to identify any of your nonverbal behaviours that appear inconsistent with your verbal message. For example, if you are claiming that your recommendation for a new social media campaign should be adopted but your body language shows a lack of confidence, you will undermine your proposal.

NONVERBAL COMMUNICATION IS KEY IN THE SPEAKER/AUDIENCE RELATIONSHIP

When we first see each other, before anyone says a word, we are already sizing each other up. Within the first few seconds we have made judgments about each other based on what we wear, our physical characteristics, even our posture. Are these judgments accurate? That is hard to know without context, but we can say that nonverbal communication certainly affects first impressions, for better or worse. When a speaker and the audience first meet, nonverbal communication in terms of space, dress, and even personal characteristics can contribute to assumed expectations. The expectations might not be accurate or even fair, but it is important to recognize that they will be present. There is truth in the saying, "You never get a second chance to make a first impression." Since beginnings are fragile times, your attention to aspects you can control, both verbal and nonverbal, will help contribute to the first step of forming a relationship with your audience. Your eye contact with audience members, use of space, and degree of formality will continue to contribute to that relationship.

As a speaker, your nonverbal communication is part of the message and can contribute to, or detract from, your overall goals. By being aware of them and practicing with a live audience, you can learn to be more aware and in control. Remember, too, that you are continuously communicating non-verbally in meetings, in conversations, and in the classroom. Your nonverbal behaviour tells a great deal about you, including your level of engagement, your level of professionalism, and your attitude.

REFERENCES

Beebe, S. [Steven]., Beebe, S. [Susan], & Redmond, M. (2002). *Interpersonal communication relating to others* (3rd ed.). Boston: Allyn & Bacon.

Mehrabian, A. (1972). *Nonverbal Communication*. Aldine-Atherton.

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Quiz Photo 2 by Joel Wyncott on Unsplash

Quiz Photo 3 by engin akyurt on Unsplash

Quiz Photo 4 by Dan Burton on Unsplash

3.11 TYPES OF NONVERBAL COMMUNICATION

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Describe the eight general types of nonverbal communication
- Explain the impacts of these nonverbal types of communications

Now that we have discussed the general principles that apply to nonverbal communication, let's examine eight types of nonverbal communication to further understand this challenging aspect of communication:

1. Space
2. Time
3. Physical characteristics
4. Body movements
5. Touch
6. Paralanguage
7. Artifacts
8. Environment

SPACE

When we discuss space in a nonverbal context, we mean the space between objects and people. Space is often associated with social rank and is an important part of business communication. Who gets the corner office? Why is the head of the table important and who gets to sit there?

People from diverse cultures may have different normative space expectations. If you are from a large urban area, having people stand close to you may be normal. If you are from a rural area or a culture where people expect more space, someone may be standing "too close for comfort " and not know it.

Edward T. Hall, serving in the European and South Pacific Regions in the Corps of Engineers during World War II, traveled around the globe. As he moved from one place to another, he noticed that people in different countries kept different distances from each other. In France, they stood closer to each other than they did in England. Hall wondered why that was and began to study what he called proxemics, or the study of the human use of space and distance in communication (Hall, E. T., 1963).

In *The Hidden Dimension*, he indicated there are two main aspects of space: territory and personal space. Hall drew on anthropology to address the concepts of dominance and submission, and noted that the more powerful person often claims more space. This occupation of space plays an important role in modern society, from who gets the corner office to how we negotiate space between vehicles. Road rage is increasingly common where overcrowding occurs, and as more vehicles occupy the same roads, tensions over space are predictable.

Territory is related to control. As a way of establishing control over your own room, maybe you painted it your favorite color, or put up posters that represent your interests or things you consider unique about yourself. Families or households often mark their space by putting up fences or walls around their houses. This sense of a right to control your space is implicit in territory. Territory means the space you claim as your own, are responsible for, or are willing to defend.

The second aspect Hall highlights is personal space, or the "bubble" of space surrounding each individual. As you walk down a flight of stairs, which side do you choose? We may choose the right side because we've learned that is what is expected, and people coming up the same stair choose their right. The right choice ensures that personal space is not compromised. But what happens when some comes up the wrong side? They violate the understood rules of movement and often correct themselves. But what happens if they don't change lanes as people move up and down the stairs? They may get dirty looks or even get bumped as people in the crowd handle the invasion of "their" space. There are no lane markers, and bubbles of space around each person move with them, allowing for the possibility of collision. Our personal space bubbles were enlarged and defined as two metres during the pandemic, and violations of this space are considered a threat to health as well as a violation of social etiquette.

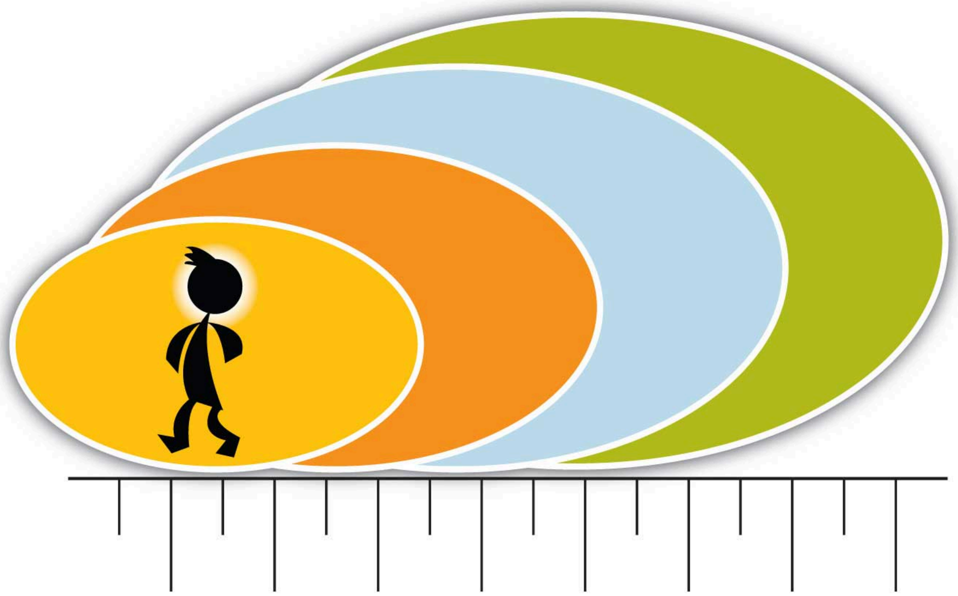
We recognize the basic need for personal space, but the normative expectations for space vary greatly by culture. You may perceive that in your home people sleep one to each bed, but in many cultures people sleep two or more to a bed and it is considered normal. If you were to share that bed, you might feel uncomfortable, while someone raised with group sleeping norms might feel uncomfortable sleeping alone. From where you stand in an aerobics class in relation to others, to where you place your book bag in class, your personal expectations of space are often at variance with others.

As the context of a staircase has norms for nonverbal behavior, so does the public speaking context. In North America, eye contact with the audience is expected. Big movements and gestures are not generally expected and can be distracting. The speaker occupies a space on the "stage," even if it's in front of the class. When you occupy that space, the audience will expect to behave in certain ways. If you talk to the screen behind you while displaying a PowerPoint presentation, the audience may perceive that you are not paying attention to them. Speakers are expected to pay attention to, and interact with, the audience, even if in the feedback is primarily nonverbal. Your movements should coordinate with the tone, rhythm, and content of your speech. Pacing back and forth, keeping your hands in your pockets, or crossing your arms may communicate nervousness, or even defensiveness, and detract from your speech. Moving toward the audience can create a more intimate connection with your audience.

Hall articulated four main categories of distance used in communication as shown in Figure 3.11.1 "Space: Four Main Categories of Distance" (Hall, E., 1966).

FIGURE 3.11.1

SPACE: FOUR MAIN CATEGORIES OF DISTANCE



Intimate, Personal, Social, and Public Space

As a general rule, try to act naturally, as if you were telling a friend a story, so that your body will relax and your nonverbal gestures will come more naturally. Practice is key to your level of comfort; the more practice you get, the more comfortable and less intimidating it will seem to you.

TIME

Do you know what time it is? How aware you are of time varies by culture. Some people, and the communities and cultures they represent, are very time-oriented. The Euro Railways trains in Germany are famous for departing and arriving according to the schedule. In contrast, if you take the train in Argentina, you'll find that the schedule is more of an approximation of when the train will leave or arrive.

"Time is money" is a common saying across many cultures, and reveals a high value for time. In social contexts, it often reveals social status and power. Who are you willing to wait for? A doctor for an office visit when you are sick? A potential employer for a job interview? Your significant other or children? Sometimes we get impatient, and our impatience underscores our value for time.

When you give a presentation, does your audience have to wait for you? Time is a relevant factor of the communication process in your speech. The best way to show your audience respect is to honor the time expectation associated with your speech. Always try to stop speaking before the audience stops listening; if the audience perceives that you have "gone over time," they will be less willing to listen. This in turn will have a negative impact on your ability to communicate your message.

Suppose you are presenting a speech that has three main points. Your audience expects you to regulate the time and attention to each point, but if you spend all your time on the first two points and rush through the third, your speech won't be balanced and will lose rhythm. The speaker occupies a position of some power, but it is the audience that gives them that position. By displaying respect and maintaining balance, you will move through your points more effectively.

Chronemics is the study of how we refer to and perceive time. Tom Bruneau at Radford University has spent a lifetime investigating how time interacts in communication and culture (Bruneau, T., 1974; Bruneau, T., 1990; Bruneau, T., and Ishii S., 1988). As he notes, across Western society, time is often considered the equivalent of money. The value of speed is highly prized in some societies (Schwartz, T., 1989). In others, there is a great respect for slowing down and taking a long-term view of time.

When you order a meal at a fast food restaurant, what are your expectations for how long you will have to wait? When you order a pizza online for delivery, when do you expect it will arrive? If you order cable service for your home, when do you expect it might be delivered? In the first case, you might measure the delivery of a hamburger in a matter of seconds or minutes, and perhaps thirty minutes for pizza delivery, but you may measure the time from your order to working cable in days or even weeks. You may even have to be at your home from 8 a.m. to noon, waiting for its installation. The expectations vary by context, and we often grow frustrated in a time-sensitive culture when the delivery does not match our expectations.

In the same way, how long should it take to respond to a customer's request for assistance or information? If they call on the phone, how long should they be on hold? How soon should they expect a response to an e-mail? As a skilled business communicator, you will know to anticipate normative expectations and do your best to meet those expectations more quickly than anticipated. Your prompt reply or offer of help in response to a request, even if you cannot solve the issue on the spot, is often regarded positively, contributing to the formation of positive communication interactions.

Across cultures the value of time may vary. Some Mexican American friends may invite you to a barbecue at 8 p.m., but when you arrive you are the first guest, because it is understood that the gathering actually doesn't start until after 9 p.m. Similarly in France, an 8 p.m. party invitation would be understood to indicate you should arrive around 8:30, but in Sweden 8 p.m. means 8 p.m., and latecomers may not be welcome. Some Orthodox Jews observe religious days where they do not work, cook, drive, or use electricity showing how they value the time off. People around the world have different ways of expressing value for time

PHYSICAL CHARACTERISTICS

You didn't choose your birth, your eye color, the natural color of your hair, or your height, but people spend millions every year trying to change their physical characteristics. You can get colored contacts; dye your hair; and if you are shorter than you'd like to be, buy shoes to raise your stature a couple of inches. You won't be able to change your birth, and no matter how much you stoop to appear shorter, you won't change your height until time and age gradually makes itself apparent. If you are tall, you might find the correct shoe size, pant length, or even the length of mattress a challenge, but there are rewards. Have you ever heard that taller people get paid more (Burnham, T., and Phelan, J., 2000)? There is some truth to that idea. There is also some truth to the notion that people prefer symmetrical faces (where both sides are equal) over asymmetrical faces (with unequal sides; like a crooked nose or having one eye or ear slightly higher than the other) (Burnham, T., and Phelan, J., 2000).

We often make judgments about a person's personality or behavior based on physical characteristics, and researchers are quick to note that those judgments are often inaccurate (Wells, W., and Siegel, B., 1961; Cash, T., and Kilcullen, R., 1985). Regardless of your eye or hair color, or even how tall you are, being comfortable with yourself is an important part of your presentation. Act naturally and consider aspects of your presentation you can control in order to maximize a positive image for the audience.

BODY MOVEMENTS

The study of body movements, called kinesics, is key to understanding nonverbal communication. Since your actions will significantly contribute to the effectiveness of your business interactions, let's examine four distinct ways body movements that complement, repeat, regulate, or replace your verbal messages.

Body movements can complement the verbal message by reinforcing the main idea. For example, you may be providing an orientation presentation to a customer about a software program. As you say, "Click on this tab," you may also initiate that action. Your verbal and nonverbal messages reinforce each other. You can also reinforce the message by repeating it. If you first say, "Click on the tab," and then motion with your hand to the right, indicating that the customer should move the cursor arrow with the mouse to the tab, your repetition can help the listener understand the message.

In addition to repeating your message, body movements can also regulate conversations. Nodding your head to indicate that you are listening may encourage the customer to continue asking questions. Holding your hand up with the palm out may signal them to stop and provide a pause where you can start to answer.

Body movements also substitute or replace verbal messages. Ekman and Friesen found that facial features communicate to others our feelings, but our body movements often reveal how intensely we experience those feelings (Ekman, P., and Friesen, W., 1967). For example, if the customer makes a face of frustration while trying to use the software program, they may need assistance. If they push away from the computer and separate themselves physically from interacting with it, they may be extremely frustrated. Learning to gauge feelings and their intensity as expressed by customers takes time and patience, and your attention to them will improve your ability to facilitate positive interactions.

TOUCH

Before giving your presentation, you may interact with people by shaking hands (often replaced in the post-pandemic era with placing your hand on your heart or slightly bowing your head) and making casual conversation. This interaction can help establish trust before you present. While speaking in a large public setting we do not often touch people in the audience, but we do interact with visual aids, our note cards, and other objects. How we handle them can communicate our comfort level. It's always a good idea to practice using the technology, visual aids, or note cards you will use in a speech during a practice session. Using the technology correctly by clicking the right button on the mouse or pressing the right switch on the overhead projector can contribute to your credibility.

PARALANGUAGE

Paralanguage is the exception to the definition of nonverbal communication. You may recall that we defined nonverbal communication as not involving words, but paralanguage exists when we are speaking, using words. Paralanguage involves verbal and nonverbal aspects of speech that influence meaning and includes tone, intensity, pausing, and even silence.

Perhaps you've also heard of a "pregnant pause", a silence between verbal messages that is full of meaning. The meaning itself may be hard to understand or decipher, but it is there nonetheless. For example, your coworker Jan comes back from a sales meeting speechless and with a ghost-white complexion. You may ask if the meeting went all right. "Well, ahh…" may be the only response you get. The pause speaks volumes. Something happened, though you may not know what. It could be personal if Jan's report was not well received, or it could be more systemic, like the news that sales figures are off by 40 percent and pink slips may not be far behind.

Silence or vocal pauses can communicate hesitation, indicate the need to gather thought, or serve as a sign of respect. Keith Basso quotes an anonymous source as stating, "It is not the case that a man who is silent says nothing" (Basso, K. A., 1970). Sometimes we learn just as much, or even more, from what a person does not say as what they do say. In his book *Gather* (2021), Richard Van Camp writes that he uses silence in storytelling for effect and to capture the listeners' attention. He says, "People who hear me share, know I take my time telling a story, giving it the time and dignity it deserves" (p. 114).

ARTIFACTS

Do you cover your tattoos when you are at work? Do you know someone who does? Or perhaps you know someone who has a tattoo and does not need to cover it up on their job? In your line of work, a tattoo might be an important visual aid, or it might detract from your effectiveness as a business communicator. Body piercings may express individuality, but you need to consider how they will be interpreted by employers and customers.

Artifacts are forms of decorative ornamentation that are chosen to represent self-concept. They can include rings and tattoos, but may also include brand names and logos. From clothes to cars, watches, briefcases, purses, and even eyeglasses, what we choose to surround ourselves with communicates something about our sense of self. They may project gender, role or position, class or status, personality, and group membership or affiliation. Paying attention to a customer's artifacts can give you a sense of the self they want to communicate, and may allow you to more accurately adapt your message to meet their needs. Potential employers or colleagues may also use artifacts to determine your sense of self.

Annie Singer (2017) has written about tattoos in the workplace. Her research of academic sources found evidence that supports the increased acceptance of tattoos in the workplace:

- 86% of young professionals did not think piercings and tattoos reduce the chance of getting jobs.
- Grooming and business attire were more important indicators in the hiring decision than tattoos and piercings (source).
- Heavily tattooed professionals felt that tattoos made them more accessible to younger coworkers.

Singer also found evidence of the negative effects of tattoos in the workplace. She notes these findings:

- Visible tattoos had a predominantly negative effect on employment selection, driven by the hiring manager's perception of customer expectations (source).
- Tattooed professionals frequently experienced unwanted touching in the workplace.

- Consumers showed a preference for non-tattooed front-line staff (source). (para. 8)

Singer concludes that "we can definitely see that there has been progress towards the acceptance of tattoos in the workplace, but highly visible tattoos can still have a negative impact, especially in customer-facing jobs" (para. 9). The social stigma of body modification will likely continue to evolve.

ENVIRONMENT

Environment involves the physical and psychological aspects of the communication context. More than the tables and chairs in an office, environment is an important part of the dynamic communication process. The perception of one's environment influences one's reaction to it. For example, Google is famous for its work environment, with spaces created for physical activity and even in-house food service around the clock. The expense is no doubt considerable, but Google's actions speak volumes. The environment is designed to facilitate the creativity, interaction, and collaboration that define the company's success.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=114#h5p-26

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3.12 MOVEMENT AND VOCAL QUALITIES IN YOUR PRESENTATION

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Explain how to use movement and voice to increase the effectiveness of your presentation.

At some point in your business career you will be called upon to give a speech. It may be to an audience of one on a sales floor or to a large audience at a national meeting. You already know you need to make a positive first impression, but do you know how to use movement and vocal qualities to the most powerful effect in your presentation? In this section we'll examine several strategies for using movement and voice.

Customers and audiences respond well to speakers who are comfortable with themselves. Comfortable doesn't mean overconfident or cocky, and it doesn't mean shy or timid. It means that an audience is far more likely to forgive the occasional "umm" or "ahh," or the nonverbal equivalent of a misstep if the speaker is comfortable with themselves and their message.

MOVEMENT

Let's start with behaviors to avoid. Would you rather listen to a speaker who moves confidently across the stage or one who hides behind the podium, one who expresses themselves nonverbally with purpose and meaning or one who crosses their arms or clings to the lectern?

Audiences are most likely to respond positively to open, dynamic speakers who convey the feeling of being at ease with their bodies. The setting, combined with audience expectations, will give a range of movement. If you are speaking at a formal event, or if you are being covered by a stationary camera, you may be expected to stay in one spot. If the stage allows you to explore, closing the distance between yourself and your audience may prove effective. Rather than focus on a list of behaviors and their relationship to environment and context, give emphasis to what your audience expects and what you yourself would find more engaging instead.

Novice speakers are sometimes told to keep their arms at their sides, or to restrict their movement to only that which is absolutely necessary. If you are in formal training for a military presentation, or a forensics (speech and debate) competition, this may hold true. But in business and industry, expressive gestures, like arm movements while speaking, may be appropriate and, in fact, expected.

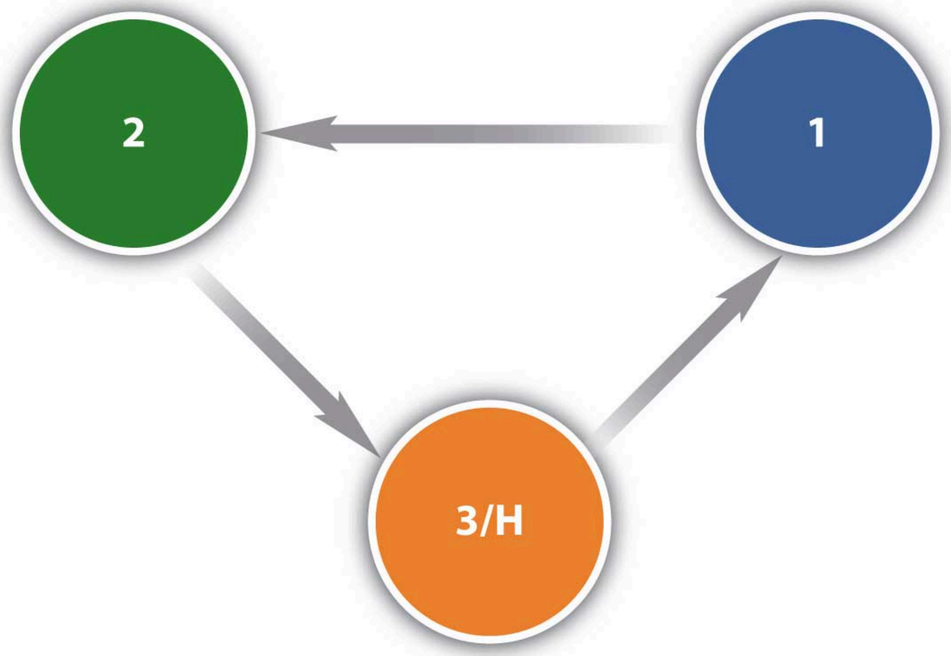
The questions are, again, what does your audience consider appropriate and what do you feel comfortable doing during your presentation? Since the emphasis is always on meeting the needs of the customer, whether it is an audience of one on a sales floor or a large national gathering, you may need to stretch outside your comfort zone. On that same note, don't stretch too far and move yourself into the uncomfortable range. Finding balance is a challenge, but no one ever said giving a speech was easy.

Movement is an important aspect of your speech and requires planning, the same as the words you choose and the visual aids you design. Be natural, but do not naturally shuffle your feet, pace back and forth, or rock on your heels through your entire speech. These behaviors distract your audience from your message and can communicate nervousness, undermining your credibility.

Positions on the Stage

FIGURE 3.12.1

SPEAKER'S TRIANGLE



In a classical speech presentation, positions on the stage serve to guide both the speaker and the audience through transitions. The speaker's triangle (see Figure 3.12.1) indicates where the speaker starts in the introduction, moves to the second position for the first point, across for the second point, then returns to the original position to make the third point and conclusion. This movement technique can be quite effective to help you remember each of your main points. It allows you to break down your speech into manageable parts. Your movement will demonstrate purpose and reinforce your credibility.

Gestures

Gestures involve using your arms and hands while communicating. Gestures provide a way to channel your nervous energy into a positive activity that benefits your speech and gives you something to do with your hands. For example, watch people in normal, everyday conversations. They frequently use their hands to express themselves. Do you think *they* think about how they use their hands? Most people do not. Their arm and hand gestures come naturally as part of their expression, often reflecting what they have learned within their community.

For professional speakers this is also true, but deliberate movement can reinforce, repeat, and even regulate an audience's response to their verbal and nonverbal messages. You want to come across as comfortable and natural, and your use of your arms and hands contributes to your presentation. A well-chosen gesture can help make a point memorable or lead the audience to the next point.

Facial Gestures

As you progress as a speaker from gestures and movement, you will need to turn your attention to facial gestures and expressions. Facial gestures involve using your face to display feelings and attitudes nonverbally. They may reinforce, or contradict, the spoken word, and their impact cannot be underestimated. As we have discussed, people often focus more on how we say something than what we actually say, and place more importance on our nonverbal gestures (Mehrabian, A., 1981). As in other body movements, your facial gestures should come naturally, but giving them due thought and consideration can keep you aware of how you are communicating the nonverbal message.

Facial gestures should reflect the tone and emotion of your verbal communication. If you are using humor in your speech, you will likely smile and wink to complement the amusement expressed in your words. Smiling will be much less appropriate if your presentation involves a serious subject such as cancer or car accidents. Consider how you want your audience to feel in response to your message, and identify the facial gestures you can use to promote those feelings. Then practice in front of a mirror so that the gestures come naturally.

In Western cultures, eye contact is essential for building a relationship with the audience. Eye contact refers to the speaker's gaze in engaging the audience members. It can vary in degree and length, and in many cases, is culturally influenced. Both the speaker's and audience member's notion of what is appropriate will influence normative expectations for eye contact. In some cultures, there are understood behavioral expectations for male gaze directed toward females, and vice versa. In a similar way, children may have expectations of when to look their elders in the eye and when to gaze down. Depending on the culture, both may be nonverbal signals of listening. Understanding your audience is critical when it comes to nonverbal expectations.

When giving a presentation, avoid looking over people's heads, staring at a point on the wall, or letting your eyes dart all over the place. The audience will find these mannerisms unnerving. They will not feel as connected, or receptive, to your message and you will reduce your effectiveness. Move your eyes gradually and naturally across the audience, both close to you and toward the back of the room. Try to look for faces that look interested and engaged in your message. Do not focus on only one or two audience members, as audiences may respond negatively to perceived favoritism. Instead, try to give as much eye contact as possible across the audience. Keep it natural, but give it deliberate thought.

VOICE

In "Your Speaking Voice", Toastmasters International (2011) says that "you can develop the sort of voice that wins favorable attention and reflects the qualities you wish to project" (p. 3). According to Toastmasters, you can correct bad speaking habits and develop effective speaking qualities by aiming to develop a voice that is

- pleasant, conveying a sense of warmth
- natural, reflecting your true personality and sincerity
- dynamic, giving the impression of force and strength – even when it isn't especially loud
- expressive, portraying various shades of meaning and never sounding monotonous or without emotion
- easily heard, thanks to proper volume and clear articulation (Toastmasters International, 2011)

In working to convey a sense of warmth, remember that your goal is to build a relationship with your audience. In most business settings, a conversational tone is appropriate in achieving a connection.

Toastmasters' second goal concerns a natural, genuine personality. Speaking from your core values, as discussed in Chapter 1.3, helps achieve this goal.

A dynamic and expressive voice uses a range of volumes, pace, and inflections to enhance the content of the speech. Toastmasters says that an effective speaker may use as many as 25 different notes:"A one-note speaker is tedious to an audience and promotes inattention and boredom. Vocal variety is the way you use your voice to create interest, excitement, and emotional involvement. It is accomplished by varying your pitch, volume, and timing" (p. 6). A dynamic voice is one that attracts attention and reflects confidence.

Filler words like "um" and "uh" can reduce your dynamism and affect your credibility since you may appear unsure or unfamiliar with your content. In addition to avoiding this filler-word habit, avoid using a "vocal fry", a low growl at the end of a sentence, or an uplift at the end of a declarative statement. The effects of these habits on your demonstration of authority and conviction are addressed in this three-minute video by Taylor Mali:

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=117#oembed-1

(Direct link to Totally like whatever, you know by Taylor Mali video)

Your volume should make the audience comfortable– not so soft that audiences must strain to hear you or so loud that audiences feel threatened or uneasy. You will need to adjust your volume depending on the size of your audience and the space to ensure that the person farthest away from you can hear. You may also need to eliminate outside noises by closing doors and windows. Be sure that you do not create noises yourself that are distracting. Shoes on tile floors, heavy jewelry, and phones can create distracting noises. If possible, you can also move closer to your audience so that they can hear you more comfortably; this technique also develops trust with your audience.

IN SUMMARY

The following 16-minute video by David JP Phillips effectively pulls together the skills discussed in this chapter. According to Phillips, a communication expert, *everyone* can be an effective speaker. As he points out in his TED Talk, we refer to presentation *skills*, not talent, indicating that we all can learn to use techniques that will help us develop a relationship with our audiences and deliver high quality presentations. Some of the skills he demonstrates in this video might be successfully incorporated in your own presentations.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=117#oembed-2

(Direct link to The 110 Techniques of Communication and Public Speaking by David JP Phillips video)

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=117#h5p-27

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3.13 PRACTISING YOUR DELIVERY

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; AND ANDREW STRACUZZI

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Identify methods of practicing your presentation that work for you

There is no example of a perfect speech delivery. You are a unique person with your own approach or style in speaking. The more aligned you are with your natural speaking style, the more genuine and effective you will be with your audience. The goal is to speak as your professional self.

Being yourself, however, also means that your concern about what others think of you can cause anxiety, even during the most carefully researched and interesting presentation. Several techniques can minimize that anxious feeling and put you in the best possible position to succeed on presentation day. You need to prepare for your presentation in as realistic a simulation as possible. What follows are some general tips you should keep in mind, but they all essentially derive from one very straightforward premise: Practice your presentation beforehand, at home or elsewhere, the way you will give it in person.

PRACTICE YOUR PRESENTATION OUT LOUD

Practice allows you to learn what to say, when and how to say it, but it also lets you know where potential problems lie. Since you will be speaking with a normal volume for your presentation, you need to practice that way, even at home. This speaking practice not only helps you learn the presentation but it helps identify any places where you tend to mispronounce words. Also, sentences on paper do not always translate well to the spoken medium. Practicing out loud allows you to actually hear where you have trouble and fix it before getting up in front of the audience.

PRACTICE YOUR PRESENTATION STANDING UP

Since you will be standing for your presentation (in all likelihood), you need to practice that way. As we mention in more detail below, the default position for delivering a presentation is with your feet shoulder-width apart and your knees slightly bent. Also practice using the speaker's triangle. Practicing this way will help develop muscle memory and will make it feel more natural when you are doing it for real.

PRACTICE YOUR PRESENTATION WITH AN AUDIENCE

The best way to prepare for the feeling of having someone watch you while giving a presentation is to have someone watch you while you practice. Ask your colleagues, friends, family, or significant other to listen to you while running through what you will say. Not only will you get practice in front of an audience, but they may be able to tell you about any parts that were unclear or problems you might encounter when delivering it on the day. During practice, it may help to pick out some strategically placed objects around the room to occasionally glance at just to get into the habit of looking around more often and making eye contact with multiple people in your audience.

PRACTICE YOUR PRESENTATION FOR TIME

You'll likely have a time limit for your presentation. Practice repeatedly to make sure you are within the time limit without sacrificing the movements, pauses, and changes of pace that make presentations effective.

It is important enough that it deserves reiterating: Practice your speech beforehand in the way you will give it on the scheduled day.

No matter how hard you practice and how diligent you are in preparing for your presentation, you are most likely going to mess up some aspect at some point. That's normal. Everyone does it. The key is to not make a big deal about it or let the audience know you messed up. Odds are that they will never even realize your mistake if you don't tell them there was a mistake.

3.14 HOW TO HANDLE AUDIENCE QUESTIONS

LUCINDA ATWOOD; CHRISTIAN WESTIN; AND LINDA MACDONALD

LEARNING OBJECTIVE

- Develop techniques to prepare for and respond to audience questions

While it's not always possible to anticipate exactly what might be asked, these steps can help you skillfully address audience questions.

1. Anticipate and Practice

List possible questions that your audience might ask after your presentation. They might include these types of questions:

Query – wanting more information
Clarification – wanting to make something more clear

Confirmation – wanting a yes or no response
Challenge – wanting to disagree / argue with what was said

Then draft answers to the questions you listed, and practice delivering your answers.

You might not have guessed the exact questions you're asked, but the practice gives you some ready answers that are easily adapted to the questions that you do get asked.

If this is a team presentation, assign teammates to answer specific questions or types of questions. For example, in a team presentation on defunding the police, Teammate A might answer questions about the law, Teammate B about social impact, and Teammate C about retraining.

2. Encourage

Sometimes it can be scary for an audience member to ask a question. So as a presenter, it's important to warmly encourage the audience to ask questions. Also, as presenters, we might look very serious or unfriendly because we're nervous or trying to think of a good answer to someone's question. Warmly encourage the audience:

- Let them know that you'll be glad to answer questions
- Smile while asking if there are questions, and while answering them
- Thank the audience member for their question, *"Thanks for asking. I'm so glad you noticed that" or s*ay something like *"That's a great question! I'll be happy to answer it."*

3. Listen and repeat

It's important to carefully listen to the question asked and then to repeat it. There are three benefits to repeating the question:

- Ensures that you properly understood the question that was asked
- Lets all of the audience members hear the question (people behind the questioner might not have heard)
- Gives you time to think and formulate a good answer

4. Answer

The final step is to answer the question, speaking clearly and making eye contact with the whole audience, not just the person who asked the question. Conclude by asking the audience member "Does that answer your question?" or "Is that the information you're looking for?"

What if you don't know the answer?

You can say, *"I'm not entirely sure, but I'd be happy to do some research and get back to you."* Be careful though – if you do this more than once or twice, you might seem ill-informed.

In an informal, collaborative meeting you could ask if anyone else has an answer.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=122#h5p-28

GIF of a microphone drop like someone does when they nail a presentation.

PART 4: COMMUNICATING IN WRITING

4.0 INTRODUCTION TO COMMUNICATING IN WRITING

LINDA MACDONALD AND KAYLER MUTYABULE

Part 4 focuses on the written forms most common in business communication. While every organization has a set of preferred tools and communication strategies, some elements are common throughout. As an effective business communicator, it will be important to understand both the internal standards used within your organization and the external practices that remain constant in your field. A business letter format will be fairly standard across industries. Margin widths, recipient address block, and signature block will be similar, but companies can vary the format with letterhead design, font styles, and borders. Reports vary greatly in format, design, and structure depending on their purpose and audience, but all require attention to readability, conciseness, and clarity.

Part 4 addresses the strategies of developing and maintaining internal and external business relationships through email, memos, letters, and reports.

LEARNING OBJECTIVES

By the end of Part 4, you should be able to

- Identify the qualities of good business writing,
- Distinguish between formal and informal writing styles,
- Create routine and informational email messages,
- Format memos and letters appropriately, and
- Organize and format a formal recommendation report.

4.1 STYLE IN WRITTEN COMMUNICATION

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Describe and identify three styles of writing.
- Provide examples where each style would be considered appropriate.

Your audience expects you to follow certain rules, customs, and formats. Violations of these things—whether intentional or unintentional—can have a negative impact on the way your communication is received.

Colloquial, casual, and formal writing are three common styles that carry their own particular sets of expectations. Which style you use will depend on your audience and often whether your communication is going to be read only by those in your company (internal communications) or by those outside the organization, such as vendors, customers or clients (external communications). As a general rule, external communications tend to be more formal. For example, corporate letterhead and business cards—designed for presentation to the "outside world"—are more formal than the e-mail and text messages that are used for everyday writing within the organization. However, there are times when you may want to violate expectations to appeal to your audience or to align with the situation. When RBC faced employee and customer anger over outsourcing in 2013, Gord Nixon wrote An Open Letter to Canadians using contractions and less formal sentence structures. This use of casual language humanized a bank accused of putting profits over people.

Style also depends on the purpose of the document and its audience. If you are creating Web page content, clear and concise use of the written word is essential. If you are writing a feature interest article for an online magazine, you may have the luxury of additional space and word count combined with graphics, pictures, embedded video or audio clips, and links to related topics. If you are sending a cover letter to a potential employer on a printed page delivered in an envelope, you won't have face-to-face interactivity, placing an additional burden on your writing to represent you as a business professional.

COLLOQUIAL

Colloquial language is an informal, conversational style of writing. It differs from standard business English in that it often makes use of colorful expressions, slang, and regional phrases. As a result, it can be difficult to understand for an English learner or a person from a different region of the country.

Sometimes colloquialisms take the form of a word difference; for example, the difference between a "Coke," a "tonic," a "pop", and a "soda" primarily depends on where you live. Immigrants to Canada quickly learn that they will use one- and two-dollar coins, "loonies" and "toonies", when they grab a coffee at "Timmies". Colloquial sayings like "Whatta y'at?" (What are you doing?) and "Stay the blazes home" have regional meaning and significance.

Colloquial language is often used in texting: "ok i did my part n put it in where you asked but tbh i worry about the rest of the group cuz i need a good mark rn." We may be able to grasp the meaning of the message, and understand some of the abbreviations and codes, but when it comes to business, this style of colloquial text writing is generally suitable only for one-on-one internal communications between coworkers who know each other well (and who do not judge each other on spelling or grammar). For external communications, and even for group communications within the organization, it is not normally suitable, as some of the codes are not standard, and may even be unfamiliar to the larger audience.

Businesses can, however, use colloquialisms strategically. For example, KFC effectively used the colloquial slogan "finger lickin' good", meaning delicious or tasty, for 64 years in the US market. These years were not free of problems. The company's 1987 launch in China included the "finger' lickin' good" colloquial slogan, but the slogan unfortunately translated into "eat your fingers off" (Cozens, 2003). The company abandoned the expression in 2020 when the colloquial metaphor was deemed inappropriate during the COVID-19 pandemic (Valinsky, 2020).

Colloquial writing may be permissible, and even preferable, in some business contexts. Popeyes Chicken in the United States used colloquial language effectively in what became known in 2019 as the "chicken sandwich wars". Popeyes Chicken and Chick-fil-A were engaged in a twitter battle over chicken sandwich supremacy. In response to a tweet from Chick-fil-A, New Orleans-based Popeyes Chicken posted a message to followers using colloquial language common in the Southern United States: "…y'all good?". This simple colloquialism achieved more than a more formal statement could have. The saying was so effective in mobilizing Popeyes fans that the company ran out of product, ending– temporarily–the chicken sandwich wars.

The feeling your colloquial language generates is ultimately what your audience will remember. If you use language that is unfamiliar to some members of your audience, you risk alienating them. The use of a colloquial term familiar to teenagers may be regarded as patronizing or perhaps you will appear to them as more authentic. Profiling your audience is essential before adopting a particular style.

Remember: Colloquial style is not an excuse for using expressions that are sexist, racist, profane, or otherwise offensive.

CASUAL OR INFORMAL

Casual language involves everyday words and expressions in a familiar group context, such as conversations with family or close friends. In this setting, the emphasis is on the communication interaction itself, and less about the hierarchy, power, control, or social rank of the individuals communicating. When you are at home, you probably dress in casual clothing that you wouldn't wear in public. Casual communication is the written equivalent of this kind of casual attire. You probably speak to your friends differently from the way you speak to your professor or work supervisor. Similarly, adjusting your level of formality in writing is important for meeting your audience's expectations.

FORMAL

In business writing, an appropriate style will have a degree of formality. Formal language is communication that focuses on professional expression with attention to roles, protocol, and appearance. It is characterized by its vocabulary and syntax, or the grammatical arrangement of words in a sentence. That is, writers using a formal style tend to use a more sophisticated vocabulary—a greater variety of words, and more words with multiple syllables—not for the purpose of throwing big words around, but to enhance the formal mood of the document. They also tend to use more complex syntax, resulting in sentences that are longer and contain more subordinate clauses.

The appropriate style for a particular business document may be very formal, or less so. If your supervisor writes you an e-mail and you reply, the exchange may be informal in that it is fluid and relaxed, without much forethought or fanfare, but it will still reflect the formality of the business environment. Chances are you will be careful to use an informative subject line, a salutation ("Hi [supervisor's name]" is typical in e-mails), a word of thanks for whatever information or suggestion they provided you, and an indication that you stand ready to help further if need be. You will probably also check your grammar and spelling before you click "send."

A formal document such as a proposal or an annual report will involve a great deal of planning and preparation, and its style may not be fluid or relaxed. Instead, it may use distinct language to emphasize the prestige and professionalism of your company. Let's say you are going to write a marketing letter that will be printed on company letterhead and mailed to one hundred sales prospects. Naturally you want to represent your company in a positive light. In a letter of this nature you might write a sentence such as "The Widget 300 is our premium offering in the line; we have designed it for ease of movement and efficiency of use, with your success foremost in our mind." But in a tweet, you might use an informal sentence instead, reading "W300—good stapler."

Writing for business often involves choosing the appropriate level of formality for the company, industry, the particular document and situation, and the audience.

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=129#h5p-29

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4.2 GOOD BUSINESS WRITING

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER] AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Identify six basic qualities that characterize good business writing.

What is "good" business writing? To be effective, you can employ strategies that make your writing more powerful and aligned more closely with your purpose, audience, context, and channel. This chapter presents six qualities of good writing and three rhetorical elements to help you develop your strategy.

SIX QUALITIES OF GOOD WRITING

Edward P. Bailey offers several key points to remember: Good business writing follows the rules, is easy to read, and attracts the reader's attention. Good writing also meets the reader's expectations, is clear and concise, and is efficient and effective.

Good Writing Follows the Rules

Bailey's first quality generates some debate. What are the rules? Do "the rules" depend on audience expectations, industry standards or what your English teacher taught you? Or are they reflected in the writing of authors you might point to as positive examples? The answer is "all of the above," with a point of clarification. You may find it necessary to balance audience expectations with industry standards for a document and may need to find a balance or compromise. Bailey points to common sense as one basic criterion of good writing, but common sense is a product of experience. When searching for balance, reader understanding is the deciding factor.

When we say that good writing follows the rules, we don't mean that a writer cannot be creative. Just as an art student needs to know how to draw a scene in correct perspective before they can "break the rules" by "bending" perspective, so too does a writer need to know the rules of language. Being well versed in how to use words correctly, form sentences with proper grammar, and build logical paragraphs are skills the writer can use no matter what the assignment. Even though some business settings may call for conservative writing, there are other areas where creativity is not only allowed but mandated. Imagine working for an advertising agency or a software development firm; in such situations, success comes from expressing new, untried ideas. By following the rules of language and correct writing, a writer can express those creative ideas in a form that comes through clearly and promotes understanding.

Good Writing is Easily Read

Writing that is easily read is writing that adjusts to audience's needs and desires within a particular context. What is easy to read? For a young audience, you may want to use straightforward, simple terms but incorporate references and language that they can relate to. An example referring to Billie Eilish may work with one reading audience and fail to connect with another. Good writing uses language appropriate for your profiled audience.

Profession-specific terms can serve a valuable purpose as we write about precise concepts, but not everyone will understand all the terms in a profession. If your audience is largely literate in the terms of the field, using industry terms will help you establish a relationship with your readers. If you are writing a report for your supervisor, a financial analyst, on the stock performance of companies in the consumer cyclical industry, you would not need to define "consumer cyclical", but if you are writing for a client, you may need to explain that the category includes companies that are subject to economic fluctuations, companies in the real estate, retail, housing, and automobile markets, for example.

The truly excellent writer is one who can explain complex ideas in a way that the reader can understand. Sometimes ease of reading can come from the writer's choice of a brilliant illustrative example to get a point across. In other situations, it can be the writer's incorporation of definitions into the text so that the meaning of unfamiliar words is clear. It may also be a matter of choosing dynamic, specific verbs that make it clear what is happening and who is carrying out the action.

Good Writing Attracts the Reader's Attention

Bailey's third point concerns attracting the reader's attention. Will they want to read it? This question should guide much of what you write. We increasingly gain information from our environment through visual, auditory, and multimedia channels, from YouTube to streaming audio, and from watching the news online. Some argue that this has led to a decreased attention span for reading, meaning that writers need to appeal to readers with short, punchy sentences and catchy phrases. However, there are still plenty of people who love to immerse themselves in reading an interesting article, proposal, or marketing piece.

Perhaps the most universally useful strategy in capturing your reader's attention is to state how your writing can meet the reader's needs. If your document provides information to answer a question, solve a problem, or explain how to increase profits or cut costs, you may want to state this in the beginning. By opening with a "what's in it for me" strategy, you give your audience a reason to be interested in what you've written.

Good Writing Meets the Reader's Expectations

In addition, good writing meets the audience's needs. To meet the reader's expectations, the writer needs to understand who the intended reader is. In some business situations, you are writing just to one person: your boss, a coworker in another department, or an individual customer or vendor. If you know the person well, it may be as easy for you to write to them as it is to write a note to your parent or roommate. If you don't know the person, you can at least make some reasonable assumptions about their expectations based on the position they hold and its relation to your job.

In other situations, you may be writing a document to be read by a group or team, an entire department, or even a large number of total strangers. How can you anticipate their expectations and tailor your writing accordingly? Naturally you want to learn as much as you can about your potential audience. How much you can learn and what kinds of information will vary with the situation. If you are writing Web site content, for example, you may never meet the people who will visit the site, but you can predict why they would be drawn to the site and what they would expect to read there. Beyond learning about your audience, your clear understanding of the writing assignment and its purpose will help you to meet reader expectations.

Good Writing is Clear and Concise

Clear and concise writing reflects the increasing tendency in business to eliminate error. Errors can include those associated with production, from writing to editing, and reader response. Your goal to create clear and concise writing points to a central goal across communication: fidelity. This concept involves our goal of accurately communicating all the intended information with a minimum of signal or message breakdown or misinterpretation. Designing your documents, including writing and presentation, to reduce message breakdown is an important part of effective business communication.

Good Writing is Efficient and Effective

Finally, good writing is efficient and effective. There are only twenty-four hours in a day and we are increasingly asked to do more with less, with shorter deadlines almost guaranteed. As a writer, how do you meet ever-increasing expectations? Each writing assignment requires a clear understanding of the goals and desired results, and when either of these two aspects is unclear, the efficiency of your writing can be compromised. Rewrites require time that you may not have but the corrections will be necessary for the efficiency and effectivity of the assignment if it was not done correctly the first time.

As we have discussed previously, making a habit of reading similar documents prior to beginning your process of writing can help establish a mental template of your desired product. If you can see in your mind's eye what you want to write, and have the perspective of similar documents combined with audience's needs, you can write more efficiently. Your written documents are products and will be required on a schedule that impacts your coworkers and business. Your ability to produce effective documents efficiently is a skill set that will contribute to your success.

Our sixth point reinforces this idea with an emphasis on effectiveness. What is effective writing? It is writing that succeeds in accomplishing its purpose. Understanding the purpose, goals, and desired results of your writing assignment will help you achieve this success. Your employer may want an introductory sales letter to result in an increase in sales leads and potential contacts. Your audience may not see the document from that perspective, but will instead read with the mindset of, "How does this help me solve X problem?" If you meet both goals, your writing is approaching effectiveness. Here, effectiveness is qualified with the word "approaching" to point out that writing is both a process and a product, and your writing will continually require effort and attention to revision and improvement.

RHETORICAL ELEMENTS AND COGNATE STRATEGIES

Another way to define good writing is to apply the goals of Aristotle's three elements of *logos* (logic), *ethos* (ethics and credibility), and *pathos* (emotional appeal). These elements (as discussed in Chapter 2.1) are essential in classical rhetoric, defined as the art of presenting an argument. Good writing appeals to all three elements to varying extents given the purpose, audience, and context.

A second set of goals involves "cognate strategies", or ways of understanding, discussed in Chapter 2.4. Like rhetorical elements, cognate strategies can be applied to public speaking, but they are also useful in writing. The strategies of clarity, conciseness, arrangement (logos), credibility, expectation, reference (ethos), and tone, emphasis, and engagement (pathos) together create good writing. The degree to which the communication meets the goals of Aristotle's three elements and the cognate strategies determines its effectiveness.

EXERCISE: THE QUALITIES OF GOOD WRITING

1. Read the following email to employees of Toto's Tax Prep:

> Hey folks,
>
> I've asked you MANY times to follow the parking lot policy. The policy clearly says that you should park only in your assigned spot, not wherever you want. Your spot was selected by a random draw. If you didn't get the spot you wanted, DEAL WITH IT! Don't take someone else's spot. That's just rude.
>
> Some of you have also started parking over at Dorothy's Shoe Store, and she's not happy and has asked me to ask you to stop doing that asap. You should be treating the local businesses in the neighborhood with more respect.
>
> I want you to read the parking policy attached to this email. You should sign it and return it to your manager. Do it by November 1. No exceptions!!! If you don't sign, you will lose your spot. And then good luck finding a place to park in this city! haha
>
> Signed,
> Henry

Identify three of the six characteristics of good writing. Briefly explain with example how the message fails to satisfy each characteristic.

2. You will send a cover letter to potential employers in application for a co-op position or post-graduate work. This letter is an important first impression, and you will want the letter to demonstrate good writing.

Look at the cognate strategies in Chapter 2.4. Briefly explain how you can apply each strategy in creating a good cover letter.

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4.3 OVERCOMING BARRIERS TO EFFECTIVE WRITTEN COMMUNICATION

[AUTHOR REMOVED AT REQUEST OF ORIGINAL PUBLISHER]

LEARNING OBJECTIVE

By the end of this chapter, you should be able to

- Describe some common barriers to written communication and how to overcome them.

In almost any career or area of business, written communication is a key to success. Effective writing can prevent wasted time, wasted effort, aggravation, and frustration. The way we communicate with others both inside and outside of our business goes a long way toward shaping the organization's image. If people feel they are listened to and are able to get answers from the firm and its representatives, their opinion toward the business will be favorable. Skillful writing and an understanding of how people respond to words are central to accomplishing this goal.

How do we display skillful writing and a good understanding of how people respond to words? Following are some suggestions.

DO SWEAT THE SMALL STUFF

Let's begin with a university student's e-mail to a professor:

> "i am confused as to why they are not due intil 11/10 i mean the calender said that they were due then so thats when i did them do i still get credit for them or do i need to due them over on one tape? please let me know thanks. also when are you grading the stuff that we have done?"

What's wrong with this e-mail? What do you observe that may act as a barrier to communication? Let's start with the lack of formality, including the fact that the student neglected to tell the professor their name, or which specific class the question referred to. Then there is the lack of adherence to basic vocabulary and syntax rules. And how about the lower case "i's" and the misspellings?

One significant barrier to effective written communication is failure to sweat the small stuff. Spelling errors and incorrect grammar may be considered minor details, but they reflect poorly on you and, in a business context, on your company. They imply either that you are not educated enough to know you've made mistakes or that you are too careless to bother correcting them. Making errors is human, but making a habit of producing error-filled written documents makes negative consequences far more likely to occur. When you write, you have a responsibility to self-edit and pay attention to detail. In the long run, correcting your mistakes before others see them will take less time and effort than trying to make up for mistakes after the fact.

CONSIDER THE NONVERBAL ASPECTS OF YOUR MESSAGE

Let's return to the example at the beginning of this section of an e-mail from a student to an instructor. As we noted, the student neglected to identify themselves and tell the instructor which class the question referred to. Format is important, including headers, contact information, and an informative subject line.

This example shows how the nonverbal aspects of a message can get in the way of understanding. Other nonverbal expressions in your writing may include symbols, design, font, and the timing of delivering your message.

Suppose your supervisor has asked you to write to a group of clients announcing a new service or product that directly relates to a service or product that these clients have used over the years. What kind of communication will your document be? Will it be sent as an e-mail or will it be a formal letter printed on quality paper and sent by postal mail? Or will it be a tweet, or a targeted online ad that pops up when these particular clients access your company's website? Each of these choices involves an aspect of written communication that is nonverbal. For example, while the words may communicate a formal tone, the font or design may not. The paper chosen to represent your company influences the perception of it. An e-mail may indicate that it is less than formal and be easily deleted.

As another example, suppose you are a small business owner and have hired a new worker named Bryan. You need him to fill out a set of tax forms required by law before you can set him up in your company payroll . Should you send an e-mail to Bryan the night before he starts work, welcoming him aboard and attaching links to the forms? Or should you wait until he has been at work for a couple of hours, then bring him the forms in hard copy along with a printed memo stating that he needs to fill them out? There are no right or wrong answers, but you will use your judgment, being aware that these nonverbal expressions are part of the message that gets communicated along with your words.

REVIEW, REFLECT, AND REVISE

Do you review what you write? Do you reflect on whether it serves its purpose? Where does it miss the mark? If you can recognize it, then you have the opportunity to revise.

Writers are often under deadlines, resulting in a rush job where not every last detail is reviewed. Often this rush leads to mistakes. Rather than go through the experience of seeing all the mistakes in your "final" product and rushing off to the next job, you may need to allow more time to focus on the task at hand and get it done correctly the first time. Manage time so that you can go over each step in detail as you review.

A mental review of the task and your performance is often called reflection. Reflection is not procrastination. It involves looking at the available information and, as you review the key points in your mind, making sure each detail is present and accurate. Reflection also allows for another opportunity to consider the key elements and their relationship to each other.

When you revise your document, you change one word for another, make subtle changes, and improve it. Don't revise simply to change the good work you've completed, but instead look at it from the perspective of the reader—for example, how could this be clearer to them? What would make it more visually attractive while continuing to communicate the message? If you are limited to words only, then does each word serve the article or letter?

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=133#h5p-30

4.4 ROUTINE AND INFORMATIONAL MESSAGES: EMAIL

This chapter is adapted from *Lean, Ethical Business Communication* (2017), by Binod Sundararajan and Linda Macdonald, published by Oxford University Press. Used with permission from the publisher.

LEARNING OBJECTIVES

- Outline the form of a routine or informational message
- Develop appropriate strategies for communicating by email
- Utilize techniques for designing effective routine or informational message

A person being overwhelmed with too many emails.

Most messages within the workplace are routine, informational messages delivered by email. Many of these messages are positive– thanking people for their contributions to a unit or announcing sales increases, for example. Most are neutral messages that convey or request information or action as colleagues share data and resources and work toward the organization's goals.

A 2019 article in *The Guardian* states that the average office worker may receive 121 emails and send about 40 each day (Spicer, 2019). This number likely went up with the increased number of people working at home in 2020. Writing in a clear, concise, and organized manner can facilitate the flow of information and work productivity.

In Western business culture, routine or informational messages follow a simple, direct pattern:

1. Opens with the purpose or main idea of the message.
2. Provides any background or necessary details.
3. Closes with a request for action and/or a courteous close.

Routine messages follow a direct pattern with the main idea or purpose at the start. Language choices and design techniques contribute to the effectiveness of a routine or informational message. Simple language that delivers the content clearly and precisely is essential for avoiding miscommunication. Design (for example, white space, lists, short paragraphs, use of bold) enhances readability.

Victoria Turk's Tedx Athens talk "How to write an email" offers additional good advice on email. Listen for what she considers the Number 1 goal in writing business emails and for her advice on the content of the greeting, body, and closing.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=142#oembed-1

(Direct link to Victoria Turk's Tedx Athens talk "How to write an email" video)

Your employer may not favour some of Turk's advice. For example, Turk advocates the use of emojis to communicate emotional intent in an email. A 2019 *Forbes* article supports her claim citing Vik Verma, 8×8 Inc. CEO: "[E]mojis help employees communicate more effectively with each other. They can indicate tone that might otherwise be misconstrued and can boost credibility" (Robinson, 2019). Your audience profile provides clues as to whether your use of emojis is appropriate. Age, gender, culture, and industry standards influence the acceptance of emojis in the workplace.

REFLECTION AND DISCUSSION

1. Do you agree with Turk's advice regarding

- email openings?
- the use of emojis?
- appropriate closings?
- elements to include or avoid in a signature block?

2. What additional advice would you offer for effective email etiquette?

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=142#h5p-31

CASE STUDIES: WORKPLACE EMAILS

Each of the following cases illustrates the challenges of effective email communication. The writers need to assess their audience, clearly understand and articulate the purpose of the message, and deliver it in a form appropriate for the workplace.

The Case of Sean MacNeil: Routine Informational Email

On his first day on the job at Fred's Fredericton Finance, Sean is asked by the supervisor, Maru Renault, to compose a message of introduction to the marketing team. Maru asks Sean to show Maru the message before sending it. Sean considers this task to be fairly simple and composes the following message:

To: Marketing@FredFin.ca
From: Sean.MacNeil@myuni.ca
Date: October 29, 2021
Subject: I'm here!

Hello! Sean here. I'm the new co-op student on the second floor, Marketing. I just started so I have no idea what I will be doing here, but as soon as you find out, let me know! Looking forward to the term!

Sean's supervisor reads the draft email and asks Sean to reconsider his approach. First, Maru points out that Sean should consider the purpose of the message. Sean was asked to provide a self-introduction. How would Sean like the marketing team to see them? The email message is Sean's first impression and should consider the professional relationship Sean would like to establish with the team. What message does the email convey? And what does Sean want the audience to do or feel as a result of the message?

Sean considers the supervisor's comments and thinks about what the message should convey. The email as is does not project a professional image. Sean used a university email account rather than the work address, which presents them as a student rather than a young professional. The use of explanation points and the casual approach further undermines the professional appearance. The humour intended in stating that they do not know what they are doing affects credibility. The lack of an appropriate closing and the lack of a signature block also show a lack of professionalism.

Maru also points out that Sean has not considered their audience. The form of the message Sean has written is more appropriate for a text message to a friend than an email to co-workers. The message will be received by everyone on the marketing team, from recent hires to senior management. The relaxed and casual workplace environment at Fred's Fredericton Finance does not mean an informal, chatty message is appropriate. Maru asks Sean what the audience would like to know about them– perhaps their full name and where they are from– and to use the message as a way to establish working relationships.

Sean reconsiders the purpose of the message. Sean wants to use the message to establish a professional relationship with co-workers. Although Sean would like to appear friendly and competent, they want to be regarded as a professional, not as a student. Sean would also like to build a professional network. They decide that it is best to err on the side of formality in his message rather than informality.


To: Marketing@FredFin.ca
From: Sean.MacNeil@FredFin.ca
Date: October 29, 2021
Subject: Greetings from co-op student Sean MacNeil

To the Marketing Team:

Hi, my name is Sean MacNeil, and I will be working with you for the next three months as a co-op student from Toronto University.

Fred Fredericton Finance's commitment to the community and team atmosphere drew me to the company. My supervising coach, Maru Renault, has already shared with me some of the Marketing team's current projects, and I am excited to contribute whatever I can to them.

I look forward to meeting all of you over the next few days. If you need to get in touch with me, I can be found at my desk near the second-floor reception or through the contact information in the signature block below.

Best regards,

Sean

Sean MacNeil, Marketing Assistant (pronouns: they, them, their)
FRED FREDERICTON FINANCE • 3421 [illegible] Way, Fredericton NB A1B 2C3
phone: (800) 555 1234 • email: Sean.MacNeil@FredFin.ca

Sean's revised message clearly identifies the **purpose or main idea** in the subject line and in the first paragraph where they announce his role with the company. In the second paragraph, Sean provides **additional detail** by communicating interest in the company and the position. The third paragraph provides a **courteous close** in expressing their interest in meeting new colleagues and providing the readers with contact details.

The revised message considers the audience. Because the audience consists of busy professionals, Sean uses a direct yet friendly approach. Sean imagines that the audience may wonder how to make contact, so Sean anticipates this need by including where they can be found and how they can be reached. The format of the letter also addresses audience needs. The message has a clear subject line so that the audience knows what the message is about. White space makes the message more readable in an online email format. The signature block is in a standard form familiar to the readers.

The Case of Sean MacNeil: Routine Request for Information

Maru then assigns Sean their first task. The company is looking for potential investment in the growing city of Halifax. He asks Sean to look at the various apps currently available in Halifax for identifying and tracking bus routes. He would like Sean to write a report for him on the basic content, cost, and customer feedback of these existing apps. Some information has already been compiled by another member of the Marketing team, Misha Aldan. Maru asks Sean to request the information from Misha and to begin work as soon as possible because Maru will need the information by next week's strategy meeting. Misha, he says, is away at a conference in Calgary for the rest of the week, but she took her computer with her.

To: Misha.Aldan@FredFin.ca
From: Sean.MacNeil@FredFin.ca
Date: October 29, 2021
Subject: Request for transit app information [The subject line explains the purpose of the message.]

Hello Misha,

I am the new co-op Marketing Assistant at FredFin. Maru Renault has asked me to gather information for a report to be presented next week on currently available apps that identify and track metro Halifax buses. [Sean opens with the reason for the request.]

Maru has indicated that you have already compiled a list of available apps and some information. I am writing a report on the content, costs, and customer feedback on transit apps and would find this information useful. [Sean provides additional detail]

Can you send me the information you have gathered? [Sean clearly asks for what he needs. The placement of the request after the white space and at the start of the paragraph highlights the question.] If you could send the information through email by tomorrow [Sean clearly states the method of delivery and the urgent need for information without being rude or abrupt.], I can begin work in preparation for next week's strategy meeting.

Thank you.

Best wishes,

Sean

Sean MacNeil, Marketing Assistant (pronouns: they, them, their)
FRED FREDERICTON FINANCE • 3421 Mulumkwei Way, Fredericton NB A1B 2C3
phone: (900) 555 1234 • email: Sean.MacNeil@FredFin.ca

Sean's message contains three essential parts for a message of request. Sean

1. **opens with the purpose** of the message (to gather information).
2. **explains the background and provides detail** (in this case, the strategy meeting and the importance and timeliness of the request).
3. **closes with a specific request** (send the information) and **a courteous close** (thanking the recipient).

Sean's message uses three short paragraphs to enhance readability. Because Misha is away at a conference, she may only have time for a quick read of the email. Sean uses white space to enhance readability by effectively dividing the message into sections and highlighting the question that starts the third paragraph. They also omit any irrelevant statements out of respect for Misha's time and to maintain professional formality.

The Case of Misha Aldan: Response to Request for Information

Misha can easily read and understand what Sean needs to complete his report. She moves quickly to the point of her message without being abrupt or rude. Her bullet-point summary of the information included in the attachment highlights the information, eliminates unnecessary language, and enhances readability. Design features, including white space and a sans serif font, make the message easy for the audience to read in an online format.

To: Sean.MacNeil@FredFin.ca
From: Misha.Aldan@FredFin.ca
Date: October 29, 20XX
Subject: RE: Request for transit app information

Hi Sean,

Welcome to FredFin!

Information that may be of use to you in completing your report on the transit apps is attached. The document includes

- copies of company descriptions of three apps, HaliGO (Apple), MyMetro (Google Play), and Where's My Ride (Google Play)
- retail prices for Halifax, Toronto, and Ottawa transit apps
- available customer feedback from January to October 2021
- lists of customizable features for HaliGO and MyMetro

I look forward to meeting you next week.

Sincerely,

Misha

Misha Aldan, Research and Development Lead (pronouns: she, her)
FRED FREDERICTON FINANCE ▪ 3421 Mulumkwej Way, Fredericton NB A1B 2C3
phone: (900) 555 5679 ▪ email: Misha.Aldan@FredFin.ca

The Case of Lara Leveaux: Emailed Information Report

Lara has been working in accounting at APPFORMS, a firm that develops mobile applications for computers and smart phones, for several weeks. Her supervisor, Yue Goldberg, has requested that she calculate and report on the the sales of the company's Maple Green app. This app helps users identify retail stores, restaurants, and growers that sell organic products.

Yue asks Lara to look at Maple Green's monthly earnings for the past year. She would like Lara to determine if the Best New App Award in March and the addition of interactive features in June coincided with increased sales. Lara is to report her findings to Yue and to the app development team.

Lara begins by gathering the monthly sales of the app, a $2.00 Android application, for the past year. She could present the sales by month in a list, but to make the trends in the data easy to see in a glance, she decides to use a line graph. She ensures that the x and y axes are labeled appropriately. Since there are only twelve data points, she feels that the chart would be even more illustrative if she added the data labels indicating the sales figure for each month on the line graph.

Lara constructs her email to Yue Goldberg and her team. She realizes that this information is one of many pieces of information that Yue and her team will use in decision-making. She decides that a direct approach in presenting the information is best for an audience that needs to access the information quickly and easily. She decides not to begin with social comments or questions but to move directly to the information requested.

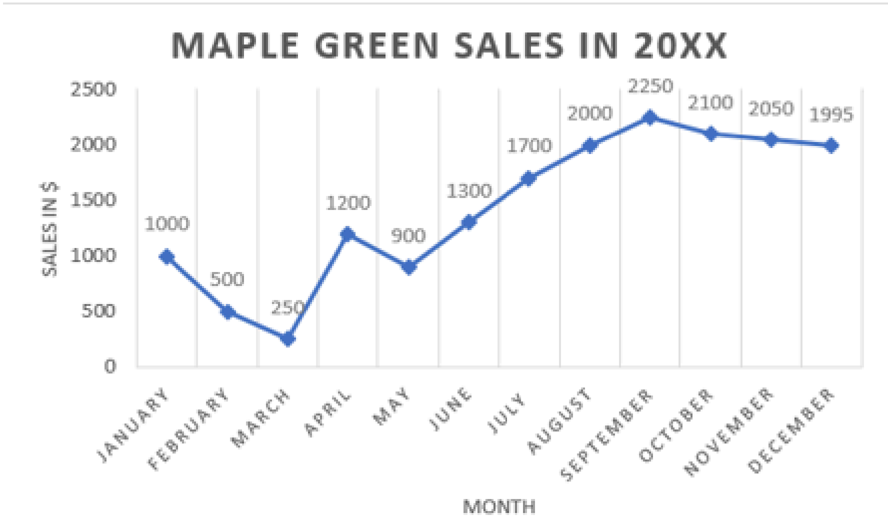
To: Yue.Goldberg@Appforms.ca; Olya.Ortega@Appforms.ca; Angus.Nonu@Appforms.ca;
Dana.Farr@Appforms.ca
From: Lara.Leveaux@appforms.ca
Date: January 11, 20XX
Subject: 2015 Maple Green Sales Trends

Dear Yue, Olya, Angus, and Sergio:

Yue has asked me to look at the 20XX sales trends for the Maple Green app.

Sales rose with the Best New App Award but increased more dramatically and then stabilized with the introduction of new interactive features. The sales figures indicate that

- Maple Green sales jumped with the Best New App Award and then fell to previous levels.
- After the introduction of new interactive features, sales increased significantly and remained at about $2000 from August.
- Sales dipped by 10% in the last quarter.



Please let me know if you have any questions or require any further information.

Regards,

Lara

Lara Leveaux, Accounting Assistant
APPFORMS Canada ■ 1600 White Horse Way, Halifax, NS A1B 2C3
phone: 902 555 4242, email: Lara.Leveaux@Appforms.ca

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=142#h5p-32

KEY TAKEAWAYS

To assist the flow of work in business, be direct, concise, and polite. Routine and informational business messages should

- Open with the purpose or main idea of the message.
- Provide any background or necessary details.
- Close with a request for action and/or a courteous close.

In addition to precise language and a clear organizational strategy, use design techniques like white space, lists, sans serif fonts, and visuals to make the information as readable as possible.

REFERENCES

Robinson, B. (September 7, 2019). Emojis: An essential tool for innovative business communication. *Forbes.* https://www.forbes.com/sites/bryanrobinson/2019/09/07/emojis-an-essential-tool-for-innovative-business-communication-really/?sh=7b1fe5e6c9e6

Spicer, A. (April 8, 2019). How many work emails is too many?. *The Guardian.* https://www.theguardian.com/technology/shortcuts/2019/apr/08/how-many-work-emails-is-too-many

4.5 ROUTINE AND INFORMATIONAL MESSAGES: MEMOS AND SHORT INFORMATIONAL REPORTS

This chapter is adapted from *Lean, Ethical Business Communication* (2017), by Binod Sundararajan and Linda Macdonald, published by Oxford University Press. Used with permission from the publisher.

LEARNING OBJECTIVES

- Identify the parts of a standard memo format
- Describe ways to enhance readability in the memo form
- Explain the organizational structure of a progress report
- Explain the purpose of a Gantt Chart

Memorandum, or "memos", are documents internal to the organization. These memos typically outline procedure, announce policies, or relay information that may be shared to a wide internal audience. They often serve as an official record of policy or activity, and for this reason, they are often designed to be printed.

Each organization will have its own preferred style and use for memos.

Informational reports are direct; the main point is first, followed by the evidence to support it. So that information flows easily throughout the organization, informational reports begin with a clear statement of purpose.

THE CASE OF SEAN MACNEIL: INFORMATIONAL REPORT

Sean has gathered information from Misha and investigated the top three transit apps in Halifax. Maru has asked Sean to bring copies of the report for distribution at the strategy meeting. He reminds Sean that the memo report should address content, cost, and customer feedback. He shows Sean where to access APPFORMS' standard memo form and reminds him that Times New Roman font is the preferred print font for the company.

Sean does not know what exactly falls under the heading of "content" and doesn't want to appear incompetent. Sean is also unsure of what their audience will do with the information, so Sean doesn't know whether they should organize the report by discussing one app at a time or by category–content, cost, and feedback. Sean fears that they will appear lacking in knowledge or initiative, but decides that asking what is included under content and how their audience can best use the information is in their best interest and the interest of the Marketing team.

Maru is pleased that Sean has asked for clarification. Maru tells them that the company is seeking a niche in the marketplace and that typically the team looks at existing, related apps to determine their strengths and weaknesses and to identify the opportunity and threats APPFORMS would face in launching a new application. They are particularly interested in the interactive features of each app. They are also interested in customer feedback. The customer feedback, though often misleading, can reveal issues of usability and customer satisfaction.

Sean creates a document in keeping with the memo format as well as audience needs:

- Sean's company uses a standard memo format with the company name at the top followed by "Memorandum."
- To, from, date, and subject are provided and the information is aligned for readability.
- The subject line clearly indicates the purpose of the memo.
- Sean omits both a greeting and complimentary close and adds handwritten initials after his name.
- The first paragraph of the informational memo is brief yet includes all the necessary information– the purpose of the report, his projected organization, and a summary of his conclusions.
- Sean uses bolded headings and subheadings so the sections are easily identified.
- Maru has indicated that the team is especially interested in the interactive features, so these features are addressed first.
- Bulleted lists in the body of the report enhance readability.
- Memos are typically printed documents, so Sean uses a serif font for print readability.

APPFORMS Canada

MEMORANDUM

TO: Marketing team
FROM: Sean McNeill
DATE: January 18, 20XX
SUBJECT: Comparison of metro bus apps

This memo report provides a comparison of the interactive features, customer feedback on usability, and cost of the top three metro transit apps in Halifax-- HaliGO (Apple), MyMetro (Google Play), and Where's My Ride (Google Play). The research indicates that HaliGO has the most interactive features and the highest customer ratings but is the only fee-charging app in the top three.

INTERACTIVE FEATURES

All three metro transit apps, HaliGO, MyMetro, and Where's my Ride, include interactive maps to enable users to find bus routes and locate stops. All three apps also identify the user's current position through a GPS. All three apps identify major landmarks along routes.

HaliGO offers the most interactive features. The following lists identify unique interactive features of each app for maps, personalization, and sharing:

Interactive map features

HaliGo

- information bubbles for landmarks along routes
- walking directions to stops
- in-transit recalculation of trips affected by road construction, accidents, or events

MyMetro

- special service buses identified

Personalization

HaliGO

- arrival alerts for users' final destinations
- ability to save routes for trips and destinations
- ability to add other transit services including taxi, tour bus, and rental bike locations
- real-time departure/arrival information

THE CASE OF MAYA CHEN: WORK PROGRESS REPORT

In addition to her work as a financial analyst, Maya Chen participates in APPFORMS' corporate social responsibility (CSR) initiatives. Maya leads a program called Link that introduces senior high school girls to careers in business and computer science. Girls are partnered with APPFORMS employees in these fields for one month. During this time, the girls meet their mentors, "shadow" them at work, and participate in seminars. The month concludes with a lunch and presentation of certificates.

It is February, and Maya has already started preparing for the event, which begins in April. A meeting of area managers is scheduled for next week and Maya has been asked to submit a progress report to the group. She has already outlined the calendar of events, sent information flyers to local schools and a regional homeschoolers' association, and selected, with a committee, a list of potential candidates. She has yet to match the girls with employees or to select the seminar topics and presenters.

The audience for the progress report includes managers who are familiar with the program. Link attracts the best and brightest students in the area and has a good reputation in the community and among the staff. Although the program is familiar to the managers, the criteria for selection, the logistical concerns, and the budget are less familiar to her audience. Because the progress report is aimed at managers, the report requires upward communication. Although the report is an internal document, Maya will need to maintain a level of formality appropriate for communication to people in higher level positions.

Maya considers the arrangement of her report. Because the program is one of many that involve students, Maya will begin with the purpose of the program and a brief overview. The body of the report will address work that has been completed and work that has yet to be done. The organization of the report follows its function; since the report reviews work in the past and addresses work for the future, a chronological pattern of organization is most logical. Maya also knows that the area managers will expect her to address any changes in expenses to date.

Maya produces a highly readable document:

- She uses a serif font appropriate for readability of printed documents.
- Bolded headings highlight key sections.
- White space around short paragraphs, lists, and headings enhances readability.
- Use of a standard memo format and chronological organizational pattern enable the reader to focus on content rather than form.
- The first paragraph concisely states the purpose and organizational strategy of the memo.

APPFORMS CANADA

MEMORANDUM

TO: Pierce Sanchez; Ziva Yaron; Vic Tremblett; Larissa Zhao: Chester Touw
FROM: Maya Chen MC
DATE: February 25, 20XX
SUBJECT: Progress Report: 20XX Link Program for High Schoolers

This report summarizes the work completed to date on the Link program for high school girls, identifies work still to be completed, and addresses potential obstacles.

BACKGROUND

The APPFORMS' Link program pairs employees with high school girls interested in careers in business or computer science. Since 2012 when the program started, 62 girls and 37 employees have participated. During the month-long program, students meet with mentors and follow them through work activities. The month concludes with a lunch for participants. At the lunch, each student participant receives a certificate of participation and a $500 university scholarship.

WORK COMPLETED

Since January 4, the following activities have been completed:

- A schedule of Link events for the month of April
- Promotional material created and distributed to all high schools in the Halifax area as well as the Homeschoolers' Association
- Confirmed participation of Dr. James Baker, Dalhousie University, as one of the three seminar speakers
- Committee selection of 24 suitable candidates for the program
- Initial request emailed to employees on February 24 resulting in 7 employees committing to the program

NEXT STEPS

The following items will be completed by March 1:

1. Select 10 of the 24 candidates.
2. Match students with employee volunteers.
3. Identify topics and speakers for the remaining two seminars.
4. Arrange location and caterers for the closing lunch event

CURRENT AND ANTICIPATED PROBLEMS

1. Of the 24 suitable candidates for participation, 10 are interested in Human Resources and 8 are interested in accounting; however, none of the employee volunteers are from Human Resources, and only 2 volunteers are from Accounting. To address this problem, I will recruit more employees specifically from the HR and Accounting areas. Selection of

____

2

Human Resources, and only 2 volunteers are from Accounting. To address this problem, I will recruit more employees specifically from the HR and Accounting areas. Selection of the final 10 student participants will be determined by available employees. We can only place one student with one employee.

2. The cost for printing the brochures for school distribution increased significantly from last year. To address this issue, we can either cut the number of participants to 9, lower costs by changing the venue and meal selection for the closing lunch event, or reallocate funds.
3. One of the managing partners typically attends the closing lunch event and presents the certificates and scholarships; however, all three managing partners are unable, due to prior commitments, to attend the event, to be held on May 2 this year. To address this problem, I will seek recommendations on an appropriate substitute.

Preparation for this year's Link program is well underway and will be completed by March 1, a month ahead of the program launch.

Progress reports vary in form and content but generally include background information, a summary of work completed, a summary of next steps, and and a list of anticipated problems and possible solutions. The date of completion for the project is confirmed in the conclusion. In addition, you may be asked to include a Gantt Chart for longer term projects (see Chapter 4.14). Gantt charts provide a timeline of work completed to date and work yet to be completed.

This student sample, a progress report on work completed to date on a recommendation report for a fictional client, is designed to demonstrate progress toward the final report. Excerpts of the progress report appear below with annotations appearing in brown type. The first paragraph tells the reader(s) who authorized the report and the purpose of the memo. The writer then provides a projected organization of the report. The document incorporates white space, headings, a table and a figure to enhance readability and provide ready access to information.

LION FINANCIAL ASSOCIATES

INTERNAL MEMORANDUM

To: Gary Patel
From: Kay Martino KM
Date: October 31, 20XX
Subject: Progress Report: Pengpeng Schultz's Stock Performance and Recommendation

This memo report, requested by Gary Patel, summarizes the work completed to date on Pengpeng Schultz's Stock Performance Report. The report includes… [briefly note the main sections and content of the report].

Background

Lion Financial Associates has a new client that wants to invest in the stock market. Pengpeng Schultz would like to… [This section provides the audience with some details on the project and the project's purpose].

Work Completed

Since September 10, I have tracked stock values for three companies in the Health and three in the Technology sector from Factiva. Secondary sources like Bloomberg and MarketLine Advantage, I gathered information on the individual companies and the sectors as a whole… [Summarize the work completed]

Preliminary Findings

The stock prices of the companies were monitored on a weekly basis from September 10 to October 29. Table 1 summarizes the data.

Table 1: Weekly Values of Stocks for Pengpeng Schultz and of the S&P/TSX Composite Index

Company	Sept.10	Sept.17	Sept.24	Oct. 1	Oct. 8	Oct.15	Oct.22	Oct.29
Aurora Cannabis Inc.	$8.25	$6.99	$6.29	$5.44	$5.52	$4.97	$4.69	$4.75
Knight Therapeutics Inc.	7.75	7.51	7.43	7.45	7.36	7.61	8.72	8.41
Bausch Health Companies Inc.	29.59	30.59	29.14	26.01	25.88	28.17	29.55	31.37
Shopify	442.98	435.67	390.72	414.16	414.39	456.91	392.02	414.00
Blackberry Limited	9.40	10.07	7.68	6.79	6.50	6.92	6.75	6.90
Evertz Technologies Limited	17.75	16.47	16.59	16.39	16.19	16.08	17.55	17.91
TOTAL:	$515.72	$507.30	$457.85	$476.24	$475.84	$520.66	$459.28	$483.34
S&P/TSX Composite Index	16537.34	16834.75	16798.33	16447.66	16293.95	16418.39	16391.52	16396.73

Source: Bloomberg, 20XX

2

According to The Canadian Press, Aurora Cannabis Inc. is ranked number 5 as one of the "Most actively traded companies on the TSX" ("Most actively traded", 2019) ...

While following the weekly stocks, I noticed a drop in the stocks of Blackberry Limited. According to *The Globe and Mail*, ...

[Include 3-5 findings. In this report, two industry sectors are covered, so the report should include some information on companies from each sector. Be sure not to come to conclusions in the Preliminary Findings section. Discuss the data, but since the research is not completed, avoid saying what the data mean or anticipate recommendations].

Note that the table should not be split between two pages. Move text to prevent dividing the table. In this case the text size was reduced. Ensure the text is readable, however.

Work To Be Completed

Over the next two weeks,... [Briefly summarize the remaining tasks...]. The Gantt Chart in Figure 1 provides a timeline. Note that Tables and Figures are numbered separately, so in this report we see Table 1 and Figure 1.

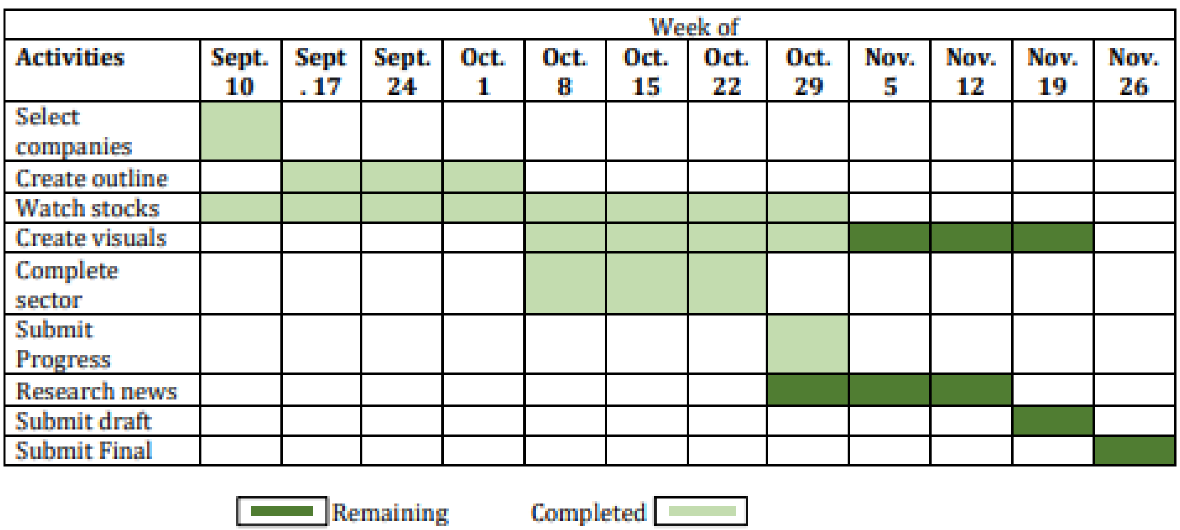


Figure 1: Gantt Chart of Activities

Anticipated problems in coming to recommendations include the impact of the recent merger ...To understand these impacts more completely, I will...[Identify here any challenges to completing the research and possible solutions to these problems].The complete report will be delivered to your office on November 26.

On a separate page, include a list of references in APA Style. Use the same heading style as used for other sections of the progress report:

References

CHECK YOUR KNOWLEDGE

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://pressbooks.nscc.ca/profsalescommunication/?p=149#h5p-33

4.6 MAINTAINING EXTERNAL BUSINESS RELATIONSHIPS IN LETTERS

This chapter is adapted from *Lean, Ethical Business Communication* (2017), by Binod Sundararajan and Linda Macdonald, published by Oxford University Press. Used with permission form the publisher.

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Assess audience needs
- Master the basic form of the business letter
- Create a style of delivery that focuses on developing, maintaining, and enhancing business relationships
- Develop techniques for focusing on the audience relationship rather than on bad news in negative messages
- Focus on what can be done rather than what can't be be dome in bad news messages
- Communicate information in a way appropriate for a given audience and situation

Business is establishing and maintaining mutually beneficial relationships. In order to establish and maintain these relationships, it is essential to:

- develop empathy,
- adjust the content of a message to ensure it is both clear and sensitive to the audience's needs and values, and
- craft messages that sustain a lasting partnership even when the message contains bad news.

Occasionally it is necessary to abandon a relationship that is no longer mutually beneficial, such as when a customer abuses staff or a supplier engages in unethical practices. For as long as the relationship is mutually beneficial, however, the relationship should be nurtured through effective, professional, and empathetic business communications.

While email is appropriate for internal communication and even most external communications, the business letter is still used when the situation or audience requires a high degree of formality or when the sender wishes to emphasize the importance of the communication. A job offer or letter of resignation, a formal complaint or letter of apology, and invitation to a special event or a request for action all may require a formatted business letter. The skills in relationship building, however, may be applicable to communications both internal and external to the organization.

BUSINESS LETTER FORMAT

The business letter format has changed over time. The standard format used to have indented paragraph's, but today's business letters most often align all elements on the left, a style called the block format. By using the block format, a writer demonstrates knowledge of current business standards and, therefore, credibility, or *ethos.*

Letters from organizations have the sender's address in a letterhead format at the top of the page. The letterhead typically includes

- the full name of the organization,
- the street address, including the suite or office number,
- the city, province, and postal code, and
- the telephone number

Some businesses also include

- a web address,
- a fax number,
- an email address, and/or
- the organization's logo.

You may wish to use your own personal letterhead for documents such as cover letters. Personal letterhead format includes the name, complete address, telephone number, and email address of the sender. Your name and contact information section in your résumé can be effectively used as a personal letterhead. Using the same style and format from the résumé adds consistency, which increases the professional appearance.

The letterhead does not have to be in the same style or font and size as the body of the letter. Be sure, though, that your name stands out from the other pieces of information through size and/or bolding.

The margins of a business letter are typically 2.54 centimetres (one inch) wide, the default set in most word-processing programs. Line spacing is typically 1.15, with a line space between paragraphs and three line spaces between the closing and the signature. Most word-processing programs include templates that follow these business standards. These standards meet the readers' expectations of structure, which allows the reader to focus on content.

North American business letters end with a closing (most commonly "Regards", "Best regards", or "Sincerely") followed by the signature, the typed name of the sender, and the position of the sender.

Although the form of the letter is standard, the writer has choices within this form, and these choices can dramatically affect the reader's impression of the sender. For example, the purpose of a letter from a university to an incoming first-year student is to offer congratulations on acceptance into university and provide instructions for confirming enrollment. To meet both purposes, the letter might combine formal elements appropriate for the importance of the occasion and with less formal elements appropriate for establishing a relationship with a new student. The formal elements might include a business letter format, a conservative serif font like Times New Roman, and a traditional closing such as *regards*. To appear more approachable and casual, the letter might temper the formality with less formal elements, for example the use of contractions, a comma rather than a colon after the greeting, and accessible language.

A writer might also choose to include their pronoun preferences in the personal letterhead or the signature block. The writer should not, however, assume the gender of the recipient. If the gender preference is not known through previous communications, avoid gendered language by omitting honorifics like "Ms", Mrs.", and "Mr." and by using the singular "they" in reference to a person.

Knowing when to adhere to structure and form and when to deviate from them requires knowledge of formal elements in writing and awareness of the audience's needs.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=151#h5p-34

(Elements of a business letter was created by Leah Lassen under a Creative Commons Attribution-Noncommercial-Sharealike 4.0 International License)

The letters in the following chapter illustrate the business letter form and, more importantly, how to adapt to audience and situation.

4.7 EXAMPLES OF MAINTAINING EXTERNAL RELATIONSHIPS IN BUSINESS LETTERS

This chapter is adapted from *Lean, Ethical Business Communication* (2017), by Binod Sundararajan and Linda Macdonald, published by Oxford University Press. Used with permission from the publisher.

Each of the following cases illustrates the challenges of effective business communication. The writers need to assess their audience, clearly understand and then articulate the purpose of the message, and deliver it in a form appropriate for an external audience. These example come from the fictional company APPFORMS, a tech company that develops mobile applications.

THE CASE OF GARY CHAMBERS: GOOD NEWS MESSAGING

Gary Chambers works in communications at APPFORMS (a fictional company). The company supports technology in schools through an annual O-Snapp competition in which students are challenged to create an original mobile application aimed at Maritime youth. Gary has been asked to write letters of congratulations to the finalists and invite them to spend a day at the company. During this visit, students will attend seminars on m-commerce (mobile commerce), share their experiences creating apps, and job shadow an APPFORMS employee.

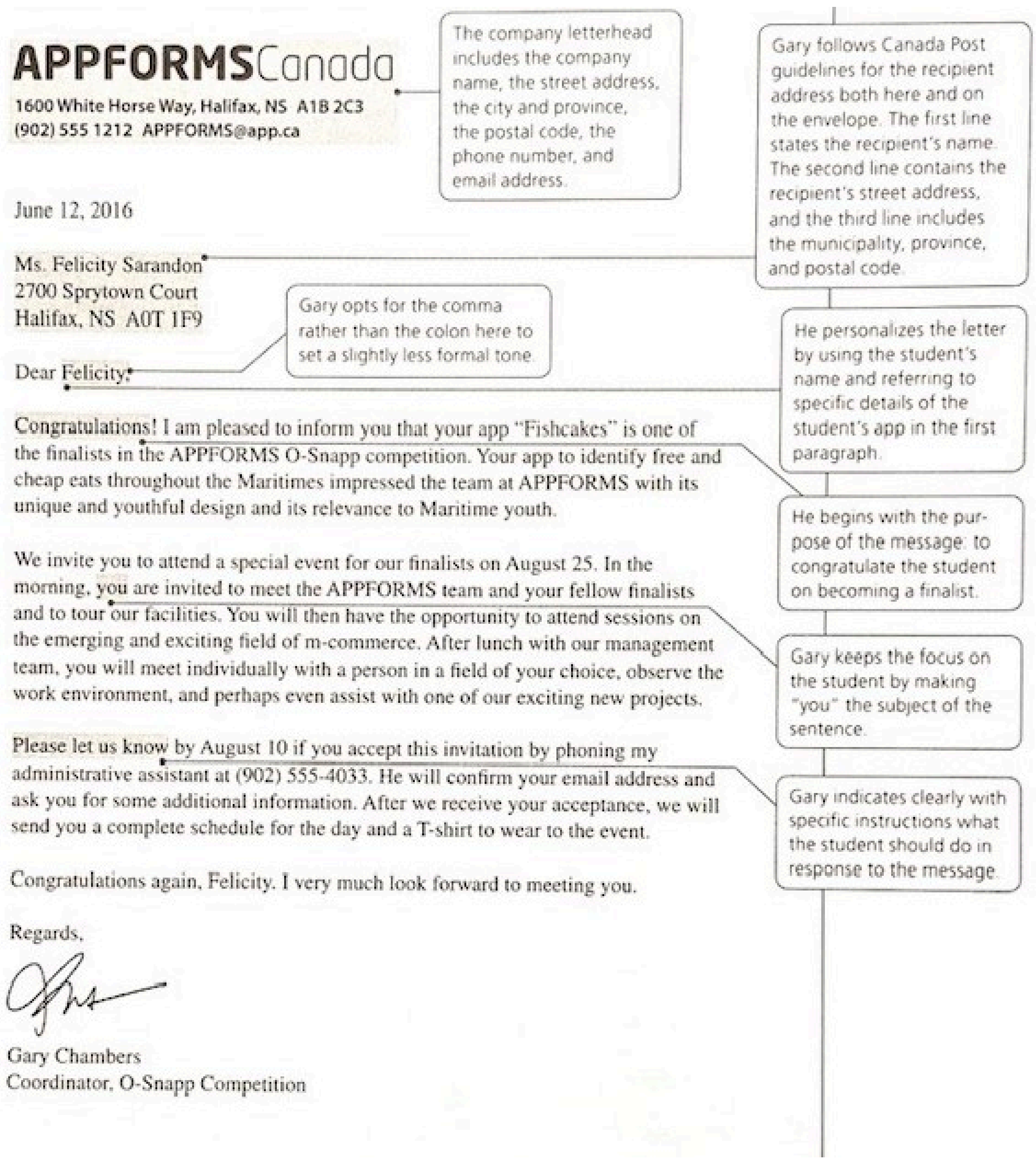
The message is aimed at an external audience, so a letter or an email would be appropriate. Gary decides, however, that the message requires an official format. A business letter adds formality to the document and importance to the students' accomplishment. Since the day students will be invited to spend at APPFORMS is two months away, the few days required for postal delivery is not an issue. The cost of postage is a worthwhile expense for the community-building that the program provides. Also, Gary knows from his own experience that a letter, so rarely received these days, can have an impact on the sense of accomplishment and pride of a young person.

Gary is a aware that the format, style, and language of the letter reflect the image and reputation of APPFORMS. The student might share the letter with family and friends, and so it could have a broad public relations impact. In addition, the letter establishes a relationship with the student. Gary would like to convey respect for the student by delivering a clear and error-free document and by using language that is accessible to a youthful audience but appropriate for an accomplished and successful emerging professional. Although the letter is a formal channel of communication, he wants to establish a natural, working relationship with the student.

Gary's message needs to satisfy his purpose, so it should contain the note of congratulations, an explanation of the day at APPFORMS, and a request to accept the invitation to the event by telephone. He knows the message is likely to be read all the way through if:

- it is no longer than one or two pages,
- he begins with the congratulations to gain the reader's attention and immediately reveal his purpose for writing,
- he personalizes the message to each recipient, and
- he maintains his focus on the needs of his audience.

Gary constructs the following personalized message to the first award-winner on his list. Note that this letter uses a gendered honorific ("Ms."). Avoid using gendered honorifics if the recipient has not made their gender preferences known.



APPFORMSCanada
1600 White Horse Way, Halifax, NS A1B 2C3
(902) 555 1212 APPFORMS@app.ca

June 12, 2016

Ms. Felicity Sarandon
2700 Sprytown Court
Halifax, NS A0T 1F9

Dear Felicity,

Congratulations! I am pleased to inform you that your app "Fishcakes" is one of the finalists in the APPFORMS O-Snapp competition. Your app to identify free and cheap eats throughout the Maritimes impressed the team at APPFORMS with its unique and youthful design and its relevance to Maritime youth.

We invite you to attend a special event for our finalists on August 25. In the morning, you are invited to meet the APPFORMS team and your fellow finalists and to tour our facilities. You will then have the opportunity to attend sessions on the emerging and exciting field of m-commerce. After lunch with our management team, you will meet individually with a person in a field of your choice, observe the work environment, and perhaps even assist with one of our exciting new projects.

Please let us know by August 10 if you accept this invitation by phoning my administrative assistant at (902) 555-4033. He will confirm your email address and ask you for some additional information. After we receive your acceptance, we will send you a complete schedule for the day and a T-shirt to wear to the event.

Congratulations again, Felicity. I very much look forward to meeting you.

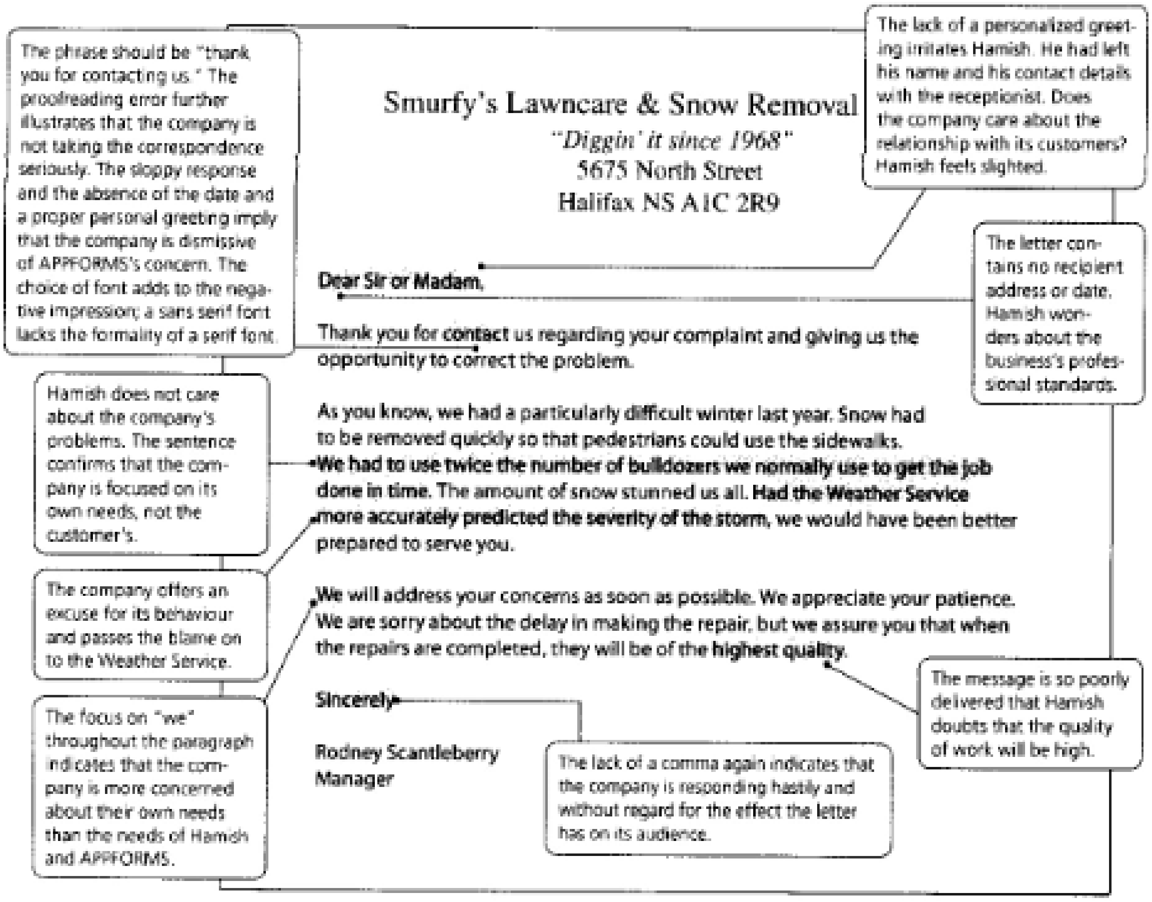
Regards,

Gary Chambers
Coordinator, O-Snapp Competition

THE CASE OF HAMISH IOSEPHO: LETTER OF COMPLAINT

Hamish Iosepho works as an administrative assistant at APPFORMS. Last year, the city contracted out snow removal. In January, one of the contractors, Smurfy's Lawncare and Snow Removal Service, damaged one corner of the APPFORMS building with a small bulldozer. APPFORMS filed a complaint with the city, which forwarded the complaint to the contractor. It is now June, and no repairs have been done. On behalf of APPFORMS, Hamish phones the contractor to complain about the lack of response concerning the damage and to request that the situation be addressed immediately. The contractor's receptionist said she would check into the problem and respond as soon as possible.

A week later, Hamish received a letter from Smurfy's in response to his request:



The phrase should be "thank you for contacting us." The proofreading error further illustrates that the company is not taking the correspondence seriously. The sloppy response and the absence of the date and a proper personal greeting imply that the company is dismissive of APPFORMS's concern. The choice of font adds to the negative impression; a sans serif font lacks the formality of a serif font.

Smurfy's Lawncare & Snow Removal

"Diggin' it since 1968"

5675 North Street

Halifax NS A1C 2R9

The lack of a personalized greeting irritates Hamish. He had left his name and his contact details with the receptionist. Does the company care about the relationship with its customers? Hamish feels slighted.

The letter contains no recipient address or date. Hamish wonders about the business's professional standards.

Dear Sir or Madam,

Thank you for contact us regarding your complaint and giving us the opportunity to correct the problem.

As you know, we had a particularly difficult winter last year. Snow had to be removed quickly so that pedestrians could use the sidewalks. **We had to use twice the number of bulldozers we normally use to get the job done in time.** The amount of snow stunned us all. **Had the Weather Service more accurately predicted the severity of the storm,** we would have been better prepared to serve you.

We will address your concerns as soon as possible. We appreciate your patience. We are sorry about the delay in making the repair, but we assure you that when the repairs are completed, they will be of the **highest quality**.

Sincerely

Rodney Scantleberry
Manager

Hamish does not care about the company's problems. The sentence confirms that the company is focused on its own needs, not the customer's.

The company offers an excuse for its behaviour and passes the blame on to the Weather Service.

The focus on "we" throughout the paragraph indicates that the company is more concerned about their own needs than the needs of Hamish and APPFORMS.

The lack of a comma again indicates that the company is responding hastily and without regard for the effect the letter has on its audience.

The message is so poorly delivered that Hamish doubts that the quality of work will be high.

The letter indicates to Hamish that Smurfy's does not care about the damage they caused. The letter seems to diminish his concern. Irritated by how the company has dismissed his complaint and the inappropriate response, Hamish is more determined than before to seek reparations. He writes to the district's councilor to voice his complaints.

In writing his complaint, Hamish

- clearly states the purpose of his letter,
- describes the problem,
- explains the impact of the problem,
- states what action should be taken and by when, and
- ends on a positive note to express goodwill.

HALIFAX WEST COMMUNITY COUNCIL
1867 Confederation Drive
Halifax West, NS A2D 2E5
www.hwcc@ourgov.ca

June 14, 2018

Mr. Eddy Bateman
Fairbricked Family Restaurant
500 Moosehead Place
Halifax West, NS A2D 3P8

Dear Mr. Bateman:

Thank you for your letter of June 7 to the council regarding the placing of signs on Highway 104. We appreciate your concerns and the opportunity to address them.

As you know, increased tourism can increase the prosperity of our community. The council applauds your effort to attract new business to the area through roadside signage, and we would like to support you in these efforts. In response to the community's growing concerns over the amount of signage on Highway 104 and the need to maintain the shoulder for emergency use, the council will erect two uniform signs to direct traffic to businesses in the area. These signs will eliminate the hazards of mobile signs along a limited access highway and preserve the beauty of our community. Although businesses appearing on the sign will incur a small fee to offset the costs, Halifax West will erect and maintain the signs. I have enclosed a drawing of the proposed uniform directional sign.

In addition to the uniform directional sign, you can place your current sign along adjacent roads. Whynot Road is a major thoroughfare leading to Highway 104. Your sign can be placed anywhere along the road as long as it does not block vehicle access or pedestrian walkways. I have enclosed a map of the area and highlighted areas where you can legally place your sign. If you would like additional details on the bylaws affecting signage, please refer to our website at Halwest.ca/signage.

Thank you for your efforts toward a thriving Halifax West. Please let me know if we can include you on our new uniform directional signs or if I can answer any questions about sign placement.

Best regards,

[signature]

Abdul Hamza
Halifax West Community Council

Enclosures

THE CASE OF ABDUL HAMZA: BAD NEWS MESSAGING

In addition to his work as a managing partner at APPFORMS, Abdul Hamza serves as a community councilor in the western part of Halifax. In a letter to the editor in this week's newspaper, a resident and business owner, Eddy Bateman, expressed anger over the city's request that he remove a sign he had placed along the highway advertising his family restaurant. The sign was professionally designed and painted. Local officials told Eddy that he could not place the sign on a limited-access highway, and it had to be removed immediately. Eddy argued that the request to remove the sign goes against the community's goal to attract tourism; his sign could bring much needed business to the area. In addition to writing to the newspaper, Eddy wrote a letter to the council and accused them of going too far with regulations.

Abdul seeks to maintain the goodwill of the community member, but he also wants to uphold the community's standards for roadside signage, which other members of the community regard as visual pollution and as a distraction– and therefore a safety issue– on public highways. In the past, signs were permitted along the highways, but the large number of signs affected the beauty of the landscape, and they cluttered the roadside shoulder intended for emergency use. The community regulations, available online, clearly state that signs are no longer permitted.

The community council supports the removal of the sign, and Abdul is tasked with writing Eddy to inform him that, despite the sign's professional design and visual appeal, it cannot be placed along the highway. He composes his letter, which focuses on the legal justification of the bad news.

HALIFAX WEST COMMUNITY COUNCIL
1867 Confederation Drive
Halifax West, NS A2D 2I5
www.hwcc@ourgov.ca

June 14, 2016

Mr. Eddy Bateman
Farfetched Family Restaurant
500 Moosehead Place
Halifax West, NS A2D 3P9

Dear Mr. Bateman:

Thank you for your letter of June 7 to the community council.

As part of our area improvements, all signs along Highway 194 must be removed. Our research indicates that people in Halifax West do not like the excessive roadside signage that has appeared over the last two years. Although your sign has been professionally created, we cannot make an exception to the ban on signs. Our regulations (bylaw C-540) clearly state that "no mobile signage, meaning any sign intended for temporary use during business hours and erected and positioned without need of mechanical equipment, can be placed along a limited access public highway, which is defined as a thoroughfare over which no easement or right of access exists by property owners abutting said highway, thus enabling unimpeded traffic flow by vehicles."

Your sign cannot be placed along a limited access highway. Please refer to the Halifax West stipulations provided on our website.

In service to our community,

Abdul Hamza

Abdul Hamza
Halifax West Community Council

Abdul reviews his letter. He has opened the letter with a positive note of thanks. He then explains the reason for the council's decision and tells Eddy what actions he needs to take: Eddy should not place the sign along the highway and should review the bylaw.

The letter format is correct. The return address is followed by the date and the recipient's address. The second paragraph looks a bit long, but Abdul thinks the letter has a sufficient amount of white space.

But he is not satisfied with the letter. It sounds cold and unsympathetic because of the legal language. Even the opening statement of thanks sounds harsh and impersonal. The message is strongly focused on the bad news.

Adbul considers the purpose of his letter. He wants Eddy to accept that he must obey the bylaw, but Abdul also wants to maintain a good relationship with a community member. The opening line is somewhat positive, but he has put a second positive statement (the reference to the professional quality of the sign) in a subordinate clause. This clause is followed be "we cannot." Abdul does not want to emphasize the negative– what *cannot* be done. He wants instead to focus on what Eddy *can* do.

He reviews the situation. Eddy is right that the community council wants to attract tourists to the area to improve the local economy. Abdul appreciates Eddy's efforts to establish a business consistent with this goal. Eddy's highway sign is tasteful and professional. He truly appreciates Eddy's letter since it reveals his interest in and dedication to the community.

Abdul decides to revise his letter to emphasize the mutual goals of both the community council and Eddy and to emphasize the positive aspects of Eddy's efforts. He wants to be clear that the sign cannot be placed on the highway, but rather than present the legal limitations, he would like to stress the possibilities. He wants to turn the focus away from the bad news of what cannot be done toward the positive of what can be done.

He drafts a new letter.

HALIFAX WEST COMMUNITY COUNCIL
1867 Confederation Drive
Halifax West, NS A2D 2I5
www.hwcc@ourgov.ca

June 14, 2016

Mr. Eddy Bateman
Farfetched Family Restaurant
500 Moosehead Place
Halifax West, NS A2D 3P9

Dear Mr. Bateman:

Thank you for your letter of June 7 to the council regarding the placing of signs on Highway 194. We appreciate your concerns and the opportunity to address them.

As you know, increased tourism can increase the prosperity of our community. The council applauds your effort to attract new business to the area through roadside signage, and we would like to support you in these efforts. In response to the community's growing concerns over the amount of signage on Highway 194 and the need to maintain the shoulder for emergency use, the council will erect two uniform signs to direct traffic to businesses in the area. These signs will eliminate the hazards of mobile signs along a limited access highway and preserve the beauty of our community. Although businesses appearing on the sign will incur a small fee to offset the costs, Halifax West will erect and maintain the signs. I have enclosed a drawing of the proposed uniform directional sign.

In addition to the uniform directional sign, you can place your current sign along adjacent roads. Whynot Road is a major thoroughfare leading to Highway 194. Your sign can be placed anywhere along the road as long as it does not block vehicle access or pedestrian walkways. I have enclosed a map of the area and highlighted areas where you can legally place your sign. If you would like additional details on the bylaws affecting signage, please refer to our website at Haliwest.ca/signage.

Thank you for your efforts toward a thriving Halifax West. Please let me know if we can include you on our new uniform directional signs or if I can answer any questions about sign placement.

Best regards,

[signature]

Abdul Hamza
Halifax West Community Council

Enclosures

THE CASE OF GLENDA GOODWIN: LETTER OF APOLOGY

Glenda Goodwin manages APPFORM's social media platforms, including a company blog, Instagram, twitter, and Facebook. Along with her team, she manages APPFORM's social identity, develops approaches for reaching stakeholders through social media, and interacts with customers to maintain an ongoing conversation.

This week has been particularly busy for Glenda. One member of her team had emergency surgery and is now absent, so her department is short-staffed. With the recent launch of a series of android apps, Glenda has felt pressure to increase the number and frequency of social media posts. One of her team members suggested the post "#whatIwant an app that does the thinking for me" as part of a conversation about an app that creates grocery lists from online recipes. Typically, content is proposed by team members, all members of the team review the proposed items, and the message is then posted. Rather than subject the proposed message to a team review, Glenda posted the item.

Within 90 seconds, APPFORMS received 115 responses to the post. Two days previously, a radical group made global headlines when it overtook a girls' school serving a minority population, burned all of its books, and terrified the students, who were now too afraid to return to school. The hashtag "whatIwant" had been used by various groups to call attention to the need to support girls who want an education but who live in areas where the education of girls is forbidden or unavailable. The hashtag had been used in thousands of posts globally.

Glenda's team had seen the hashtag but had not verified its original meaning. Much of the team's energy was being spent on social social media that focused on the release of the new apps, and they had not been monitoring current happenings and trends. Glenda was not aware of the hashtag's use to support girls' education, so the proposed hashtag and comment did not raise alarms.

As soon as Glenda received the first responses from outraged stakeholder and members of the public, she investigated the issue. She was horrified to discover the implications of the post. These stakeholders were right; the use of the hashtag at this time was terribly inappropriate, and the reference to wanting an app that "does the thinking" at a time when girls are being denied the opportunity to learn was appalling.

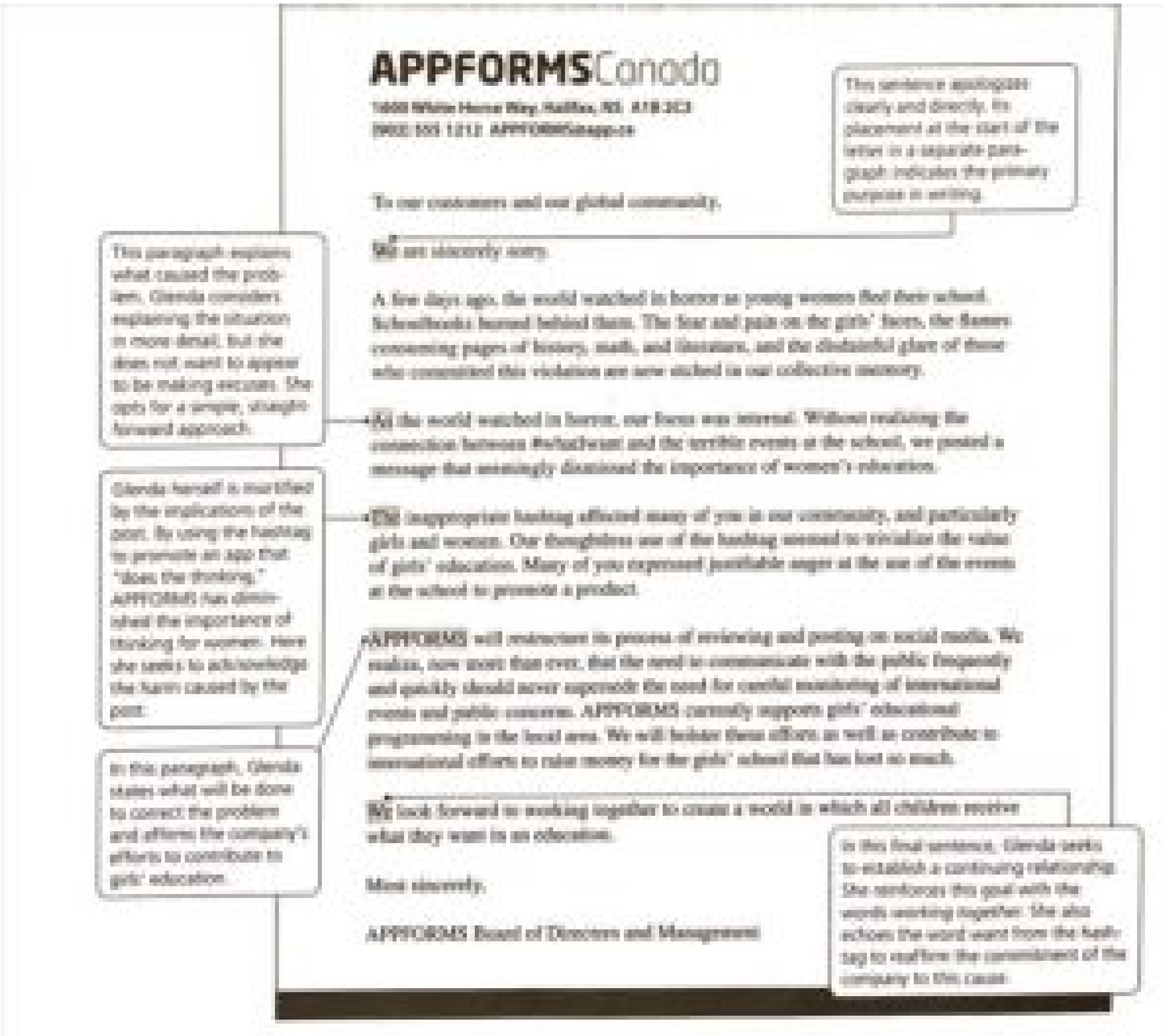
Glenda immediately withdrew the offensive post. She knew she must send an apology as soon as possible. Apologies from organizations are common now that consumers hold organizations to higher standards of social responsibility. Because communication between consumers and businesses is more direct and more frequent through technology, Glenda realizes that her response must be quick, but, to avoid making the situation worse, carefully crafted. She will first send an apology using social media and then write a letter of apology in a press release.

Models of these apologies are everywhere. Glenda starts by doing some online research. She finds an article by Josh Bloch of CBC News entitled "Age of the public apology: How saying sorry has gone pro." Bloch cites Chris Lehane, author of *Masters of Disaster: The Ten Commandments of Damage Control*. According to Lehane, Bloch writes, the apology should be delivered soon after the offensive comment has been made. "I'm sorry" should appear early in the message, the message should indicate acceptance of responsibility rather than offer excuses, and the apology should state what actions will be taken and include assurances that the offence will not occur again.

She finds a similar structure outlined by Perfect Apology in "Sample apology letter: An analysis of the JetBlue apology". The article breaks down JetBlue's apology for poor customer service following a severe winter storm that caused travel delays. The airline's apology began with "We are sorry and embarrassed. But most of all, we are deeply sorry." This beginning satisfies Lehane's suggestion to say "I'm sorry" early in the message. As the Perfect Apology article points out, the second paragraph of of JetBlue's apology explains what happened in the incident without casting blame elsewhere, even on the weather. The letter goes on to acknowledge the harm that the incident caused customers. JetBlue then outlines the measures to be taken to ensure a similar problem does not occur in the future. The airline's desire to repair and maintain its relationship with customers is evident in the offer of compensation and the statement, "Nothing is more important than regaining your trust, and all of us here hope you will give us the opportunity to welcome you onboard again soon and provide you the positive JetBlue experience you have come to expect form us."

Glenda extracts from these sources her structure for the apology":

- a direct apology
- an explanation of how and why the problem occurred,
- an acknowledgment of the hurt or dissatisfaction of stakeholders,
- the efforts to correct the problem, and
- a desire to continue the relationship.



APPFORMSCanada

1600 White Horse Way, Halifax, NS A1B 2C3
(902) 555 1212 APPFORMS@app.ca

To our customers and our global community,

We are sincerely sorry.

A few days ago, the world watched in horror as young women fled their school. Schoolbooks burned behind them. The fear and pain on the girls' faces, the flames consuming pages of history, math, and literature, and the disdainful glare of those who committed this violation are now etched in our collective memory.

As the world watched in horror, our focus was internal. Without realizing the connection between #whatIwant and the terrible events at the school, we posted a message that seemingly dismissed the importance of women's education.

The inappropriate hashtag affected many of you in our community, and particularly girls and women. Our thoughtless use of the hashtag seemed to trivialize the value of girls' education. Many of you expressed justifiable anger at the use of the events at the school to promote a product.

APPFORMS will restructure its process of reviewing and posting on social media. We realize, now more than ever, that the need to communicate with the public frequently and quickly should never supersede the need for careful monitoring of international events and public concerns. APPFORMS currently supports girls' educational programming in the local area. We will bolster these efforts as well as contribute to international efforts to raise money for the girls' school that has lost so much.

We look forward to working together to create a world in which all children receive what they want in an education.

Most sincerely,

APPFORMS Board of Directors and Management

4.8 ANALYTICAL REPORT WRITING

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Identify the main parts of a formal report
- Explain how each section of the report satisfies a reader's needs

In the workplace, you will be asked to create a variety of reports. These reports may be written to deliver information or recommendations either internally within the organization or externally to stakeholders such as clients or suppliers. These reports may be sent in the form of a manuscript, memo, or email attachment. You may be asked to deliver information in a template, such as a travel expense report or a quarterly sales report. The form of the report and delivery mode are determined by external factors, such as industry conventions or citation styles, as well as internal factors influenced by the culture of the organization and its branding.

Every organization has its own methods of formatting various types of reports, so it is important to familiarize yourself with the organization's preferred style. When you write a report as a university course assignment, you will follow certain academic conventions, such as APA citation style, as well as satisfy expectations of your field, such as conciseness. Other aspects of the report will follow guidelines established internally for the course. These guidelines are established through your instructor's assignment description and rubric. The extended example provided in Chapter 4.15 may be relevant for your organization or university, but you need to verify the internal standards for your situation. Every report you complete will have different requirements based on audience, purpose, channel, and company or organization.

Informational reports record and organize information. The general purpose of these reports is to convey information. The specific purposes are typically defined by the type of report. Progress reports, lab reports, credit reports, and expense reports all satisfy particular needs in the organization.

The general purpose of an analytical report is to persuade through analysis of information. The specific purpose may be to solve a problem, to establish a cause and effect, or to make recommendations. Analytical reports differ from informational reports in that they persuade the reader to think, act, or do something in response. The next section outlines the form for a common type of report– a recommendation report.

PARTS OF A FORMAL RECOMMENDATION REPORT

Organizations will have various requirements for the parts of a report. In addition to the parts listed below, an organization may require a **letter or memo of transmittal** written to the person who authorized the report. The memo or letter of transmittal summarizes the key points, offers additional assistance, and thanks the one who authorized the report for the opportunity to complete it. This document is written in a more informal style than the body of the report; it may use the pronoun "I" and contractions but maintains professionalism.

Some reports may also require **appendices** that include additional information, documents, or tables and figures. The appendices are not essential to the flow of the argument but add more depth and detail. For example, if you gathered information on user bus route preferences through a printed survey, you would include the data in the report body, and you would put a copy of the survey in the appendix.

The following chart outlines the main parts of your report and explains how each part satisfies the needs of the readers.

REPORT PART	CONTENTS	AUDIENCE NEED
Title Page	Includes running head, full report title, for whom the report was prepared and affiliation, the author's name and affiliation, and the date.	The audience needs a clear announcement of the report content, the intended audience, the person responsible for the document, and the report's timeliness.
Table of Contents	The table of contents establishes the order of the report and distinguishes main sections from subsections.	The table of contents allows the reader to see the scope, organization, and content of the report quickly and to identify sections of interest.
List of Illustrations	The List of Illustrations presents tables and figures with titles. As shown in the example report, tables and figures are listed separately.	Tables and figures are easy to locate if presented in a separate section of the Table of Contents. If there are more than four tables and figures, the List of Illustrations is presented on a separate page to enhance readability.
Executive Summary	A one-page summary of the key points from each of the main sections of the report.	The key points are outlined in the executive summary. Every section of the report should be addressed. In a recommendation report, the recommendations should be highlighted.
Introduction	This section includes, first, the purpose of the report. The Background, Scope and Limitations, Methods, and Definitions follow. The Introduction concludes with an overview of the organizational structure of the report and a transition to the following section.	The introduction situates the reader. It clearly and directly announces the purpose of the report and provides background information to establish the context. The Scope and Limitations section manages reader expectations by announcing what will be and will not be addressed in the following pages. To establish the reader's credibility and to identify the types of sources used in the report, the writer summarizes the methods used to understand the problem. So that the audience understands any jargon or technical terms, definitions are provided.
Findings and Discussion	The body of the report presents the findings (what the research shows) and discussion (what secondary sources say about the information you have gathered). This section answers the question, "What do the data and evidence **show**?" The writer does not tell what the data mean or make recommendations here. The findings and discussion are presented in an organizational pattern appropriate for the topic. This organizational pattern may be by category, importance, or process sequence.	The reader needs a clear understanding of the facts as well as an understanding of common perspectives on this information. So that the reader can access the information quickly and easily, the report includes headings, short paragraphs, and appropriate white space.
Conclusions	This section answers the question, "What does the data **mean**?". Each section of the Findings and Discussion should have a corresponding conclusion. If, for example, the data show that Cookie A scored highest in a taste test, the conclusion would be "Cookie A is the best choice for a meeting of 20 people." The conclusion connects clearly to the purpose of the report. In the example, the purpose of the report was to identify the best cookie for a meeting of 20 people.	The findings and discussion present information, and the conclusion tells what this information means. The audience needs a clear understanding of this meaning and a clear understanding of how the information relates to the purpose of the report.
Recommendations	This section answers the question, "What should the reader or decision-maker should **do** given the conclusions?".	The report is focused on what should be done. For the audience, this section is most significant. The previous sections build the case for what should be done.
References	All works cited are included in the list of references. These references should be in APA Style. Double space between reference items. Use hanging indents	The references illustrate for the reader the depth of your research and the scope of your analysis. The references add credibility to your argument through the use of expert analysis.

Appendix	The appendix may include additional tables, figures, surveys, documents, or other material on which the conclusions and recommendations were drawn. These items provide extra information should the reader want to see it. Refer to the appendix in the body of the report where it is relevant to the discussion. Appendices should be labelled as Appendix A, Appendix B, etc.	The reader may wish to review some documents or material that was used to come to your conclusions but is not essential to the main argument. For example, a report on student satisfaction with first-year courses may discuss the findings of the survey in the body of the report but provide a copy of the original survey in the appendix.

Each section has a particular purpose and satisfies a particular audience need. It is especially important to distinguish between findings, conclusions, and recommendations.

The findings tell the audience what the the data and facts show. This section lays out the evidence from both primary sources and secondary sources. Primary sources include raw materials and original content in documents, statistics, surveys, or other sources of information. Secondary information describes and assesses the primary information. For example, if you are writing a report on the stock portfolio of a client, the TSX stock values are a primary source. Secondary source information about the company or industry performance may come from financial analysts, scholarly articles, or newspapers, or business magazines. In your Findings and Discussion, avoid coming to a conclusion about what all this information means for the client.

The conclusions tell what the information means. In this section you evaluate the information. For example, in your findings, you might show how the stock values of Stock A and Stock B fluctuated over six months and use secondary sources to explain the market changes. In your conclusion, you might say, "Stock A outperformed Stock B according to both stock values and in the opinion of industry experts." The word *outperforms* indicates your evaluation of performance.

Your recommendation is based on the conclusion and tells what the reader should think or do. Stock A outperformed Stock B. So what should the client do? Your recommendation might be that the client should a) sell Stock B, and b) purchase additional shares of Stock A.

The following presentation illustrates these distinctions further. The premise is unrealistically simple: You are asked to select a cookie for a meeting of 20 people and to justify your selection. While the premise is simple, the scenario helps clarify the distinctions between findings, conclusions, and recommendations.

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://pressbooks.nscc.ca/profsalescommunication/?p=160#h5p-35

4.9 RESEARCH TOOLS

DALHOUSIE UNIVERSITY LIBRARIES AND LINDA MACDONALD

LEARNING OBJECTIVES

By the end of this chapter, you should be able to

- Access and utilize key databases for business

In reports, data and information from sources are essential for building *logos* and *ethos.* Research yields the data, statistics, and logical reasoning that establish *logos*. Reliable, unbiased sources of information, verified experts, and clear and informed explanations build *ethos*. You may have an opinion about something, but without a foundation of knowledge, your claims will not be persuasive.

Every university has databases accessible by students for research. At Dalhousie University, a list of available research tools is provided in the Commerce Research Guide. In your Business Communication course at Dalhousie, you will use Factiva and MarketLine to conduct your research.

The videos presented here explain how to access Factiva and MarketLine Advantage as a Dalhousie University student. If you are from another university, your process will be different in accessing these tools, but once you are in the site, your research will be conducted in the same way. Each video is between three and four minutes long.

“INTRODUCTION TO FACTIVA” BY DALHOUSIE UNIVERSITY LIBRARIES

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=162#oembed-1

A transcript of the “Introduction to Factiva” video is available.

“INTRODUCTION TO MARKETLINE” BY DALHOUSIE UNIVERSITY LIBRARIES

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=162#oembed-2

A transcript of the “Introduction to MarketLine” video is available.

In addition, you may wish to access the following:

- Additional online tutorials
- Additional Subject Guides
- Live Help (available **only** to Dalhousie students)
- Contact information for the five Dalhousie University Libraries

4.10 HEADINGS

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; ANDREW STRACUZZI; AND LINDA MACDONALD

Headings are the titles and subtitles you see within the actual text of much professional, scientific, technical, and business writing. Headings are like the parts of an outline that have been pasted into the actual pages of the document.

Headings are an important feature of professional writing. They alert readers to upcoming topics and subtopics, help readers find their way around in long reports, skip what they are not interested in, and break up long stretches of straight text.

Headings are also useful for writers. They keep you organized and focused on the topic. When you begin using headings, your impulse may be to slap in the headings *after* you've written the rough draft. Instead, visualize the headings *before* you start the rough draft, and plug them in as you write.

GENERAL GUIDELINES

Use headings to mark off the boundaries of the major sections and subsections of a report.

Make the phrasing of headings parallel.

Avoid "stacked" headings—any two consecutive headings without intervening text.

When possible, omit articles from the beginning of headings. For example, "The Diversified Industries Sector" can easily be changed to "Diversified Industries Sector" or, better yet, "Diversified Industries."

Don't use headings as lead-ins to lists or as figure titles.

Avoid "widowed" headings; that's where a heading occurs at the bottom of a page and the text it introduces starts at the top of the next page. Keep at least two lines of body text with the heading, or force it to start the new page.

FORMAT AND STYLE

The style and format for headings shown in this chapter is not the "right" or the "only" one; it is just one among many. Be sure to ask your instructor or supervisor about internal style preferences.

When formatting your headings and subheadings, pay close attention to details such as vertical and horizontal spacing; capitalization; use of bold, italics, or underlining; and punctuation.

First-level headings are the highest level of headings in your document. Apply the same format or style to all first-level headings. This style should be different from that which is applied to second-level heading. All second-level headings should have the same style. Similarly, this style should be different from that which is applied to third-level headings (and all third-level headings should have the same style), and so on. There are different ways and styles you can use to differentiate various levels of headings. Use whatever styles are appropriate for the document and audience.

The first section of a report is the Introduction, but because it is understood to be the introduction, no heading is needed. Instead, place the title of your paper or report in place of the word "Introduction". Subsections of the introduction will use Level 2 headings.

If you are adhering to APA Style formatting use the following heading styles:

Level	APA Style Format
1	**Centred, Bold, Title Case Heading** Text begins with a new, indented paragraph.
2	**Flush left, Bold, Title Case Heading** Text begins with a new, indented paragraph.
3	***Flush left, Bold Italic, Title Case Heading*** Text begins with a new, indented paragraph.
4	**Indented, Bold, Title Case Heading, Ending With a Period.** Text begins on the same line and continues as a regular paragraph.
5	***Indented, Bold Italic, Title Case Heading, Ending With a Period.*** Text begins on the same line and continues as a regular paragraph.

The Example Analytical Report in Chapter 4.15 uses different formatting for headings. This format is preferred in Dalhousie University's Business Communication course. Note that the instructors in this course prefer block style paragraphing, another internal standard within the course.

Level	COMM 1715 Format
1	**Centred, Bold, Title Case Heading** Text begins with a new paragraph (no indent). Use Level 1 headings for the report title on the cover page, Contents, List of Illustrations, Executive Summary, report title at the start of the report, Findings and Discussion, Conclusions, Recommendations, References and Appendices.
2	**Flush left, Bold, Title Case Heading** Text begins with a new paragraph (no indent). Use this level heading for subsections of the introduction (Purpose, Background, Scope and Limitations, Methods, and Key Terms) and second-level subsections of the Findings and Discussion.
3	***Flush left, Bold Italic, Title Case Heading*** Text begins with a new paragraph (no indent).

Ask your instructor or work supervisor what internal standards might apply.

ATTRIBUTION

This chapter is an adaptation of "Headings" in the Online Technical Writing Textbook by D. McMurray and is used under a CC-BY 4.0 International license.

4.11 EMPHASIS

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; AND ANDREW STRACUZZI

Emphasis, as the term is used here, is the use of typographical effects to call attention to text. These effects can include italics, bold, all-caps, quotation marks, color, and so on. Emphasis attracts the attention of the reader—or "cues" them—to actions they must take or to information they must consider carefully.

Practically any special textual effect that is different from regular body text can function as an emphasis technique. Things like italics, bold, underscores, caps, different size type, alternate fonts, colour, and more can act as emphasis techniques.

However, if emphasis techniques are used in excess, readers can become reluctant to read a text and may avoid it altogether because it is too busy or distracting. ***NOTICE HOW UNREADABLE THIS SENTENCE IS BECAUSE TOO MUCH EMPHASIS IS USED.*** When it comes to emphasis, there can be too much of a good thing! Emphasis techniques should be used strategically and consistently.

ATTRIBUTION

4.12 LISTS

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; AND ANDREW STRACUZZI

Lists are useful because they emphasize selected information in regular text.

Lists can be horizontal, with the listed items included directly in the sentence/paragraph. Lists can be vertical, such as when you see a list of three or four items strung out vertically on the page rather than in normal paragraph format. Lists–particularly vertical lists–are noticeable and readers are likely to pay more attention to them. Certain types of lists also make for easier reading. For example, in instructions, it is a big help for each step to be numbered and separate from the preceding and following steps. Lists also create more white space and spread out the text so that pages don't seem like solid walls of words.

Like headings, the various types of lists are an important feature of professional writing. They help readers understand, remember, and review key points. They help readers follow a sequence of actions or events. They also break up long stretches of straight text.

GENERAL GUIDELINES

Use lists to highlight or emphasize text or to enumerate sequential items.

Use a lead-in to introduce the list items and to indicate the meaning or purpose of the list.

Make sure that each item in the list reads grammatically with the lead-in.

Make list items parallel in phrasing.

Avoid overusing lists because using too many lists destroys their effectiveness.

Bullet points are used when each item in a bulleted list is of equal importance. This use is in contrast to numbered lists where items may have different levels of importance, priority, or sequence. Use bulleted lists for items that are in no required order. Use numbered lists for items that are in a required order (such as step-by-step instructions) or for items that must be referred to by item number.

HORIZONTAL LISTS

Use a colon to introduce the list items *only* if a complete sentence precedes the list. Omit the colon if the lead-in is not a complete sentence.

Incorrect: For this project, you need: tape, scissors, and white-out.

Correct: For this project, you need tape, scissors, and white-out.

Use both opening and closing parentheses on the list item numbers or letters: (a) item, (b) item, etc. (Don't just use one parenthesis.) Use either regular numbers or lowercase letters within the parentheses.

Use lowercase letters for the text of in-sentence lists items, except when regular capitalization rules require caps.

Punctuate the horizontal list items with commas if they are not complete sentences. Use semicolons if they are complete sentences.

Incorrect: Follow these instructions to get to the store from your home: (1) drive south for three blocks, (2) turn right, (3) drive west for 6 blocks, (4) turn left, (5) drive for half a block, (6) turn right into the parking lot.

Correct: Follow these instructions to get to the store from your home: (1) drive south for three blocks; (2) turn right; (3) drive west for 6 blocks; (4) turn left; (5) drive for half a block; (6) turn right into the parking lot.

Use the same spacing for horizontal lists as in regular non-list text.

Make the horizontal list occur at the end of the sentence. Never place a horizontal list introduced by a colon anywhere but at the end of the sentence:

Incorrect: The following items: tape, scissors, and white-out are needed for this project.

Correct: The following items are needed for this project: tape, scissors, and white-out.

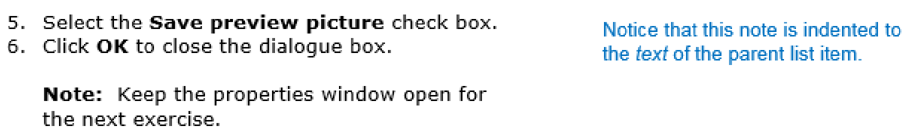
VERTICAL LISTS

Introduce the list with a lead-in phrase or clause. Use a colon to introduce the list items *only* if the lead-in is a complete sentence. Omit the colon if the lead-in is an incomplete sentence.

Avoid using headings as lead-ins for lists.

Use consistent spacing, indentation, and punctuation.

When a separate notice or explanatory paragraph follows an item, indent that separate material to the text of the parent list item, as illustrated:



The indented material in the Note elaborates on the parent list Item 6.

Use the "hanging indent" format for list items two or more lines long.

Use sentence-style capitalization on list items.

Punctuate list items only if they are complete sentences that complete the sentence begun by the lead-in.

When possible, omit articles (*a*, *an*, *the*) from the beginning of non-sentence list items.

A WORD OF CAUTION

If your list contains more than 6-8 items, you might consider consolidating list items or re-formatting your list. Lists with too many items can be overwhelming and challenging to read.

ATTRIBUTION

This chapter contains material taken from "Bulleted and numbered lists" in Online Technical Writing Textbook by D. McMurray and is used under a CC-BY 4.0 International license.

4.13 USING GRAPHICS

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; AND ANDREW STRACUZZI

A picture showing the importance of well placed imagery

A picture is worth a thousand words, as the old saying goes. Sometimes, despite writing clearly and concisely, it can be helpful to your audience if you use supporting graphics–whether that be tables, illustrations, maps, photos, charts, or some other type of visual aid.

Before getting into details on creating, formatting, and incorporating graphics, consider the types and their functions. You can use graphics to represent the following elements in your writing:

- **Objects** — If you are describing a possible location for a new business, you may want to include a map, photo, or diagram of the area.. If you are launching a new product, a drawing or photograph will help the audience envision it. Photographs, drawings, diagrams, and schematics are the types of graphics that show objects.
- **Numbers —** If you are discussing the rising cost of housing in Vancouver, you could use a table with the columns being for five-year periods since 1970; the rows could be for different types of housing. You could show the same data in the form of bar charts, pie charts, or line graphs. Tables, bar charts, pie charts, and line graphs are some of the principal ways to show numerical data.
- **Concepts** — If you want to show how your company is organized, such as the relationships of the different departments and officials, you could set up an organization chart, which is boxes and circles connected with lines showing how everything is hierarchically arranged and related. This type of graphic depicts non-physical, conceptual things and their relationships.
- **Words** — Graphics can be used to depict words. You've probably noticed how some textbooks may put key definitions in a box, maybe with different color in the background. The same can be done with key points or extended examples.

DOCUMENTING GRAPHICS

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any graphics that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

GUIDELINES FOR USING GRAPHICS

Use graphics when a visual element can explain or strengthen your content. Graphics also help to break up the amount of text on a page.

Make sure your graphics are appropriate to your audience, subject matter, and purpose — don't present beginners with advanced, highly technical graphics they can't understand.

Intersperse graphics and text on the same page. Place graphics as near to the point in the text where they are relevant as is reasonable, and don't put them on pages by themselves or attach them to the end of documents. However, if a graphic does not fit properly on one page, put it at the top of the next, and continue with regular text on the preceding page. Don't leave half a page blank just to keep a graphic near the text with which it is associated.

Always discuss graphics in nearby text preceding the graphic. Don't just throw a graphic out there unexplained. Orient readers to the graphic and explain its basic meaning. Graphics are not there for decoration! They need to have a purpose and be introduced before the reader encounters them on the page. The first mention of a graphic is called a lead-in statement, and your graphics must always be introduced by a lead-in. Similarly, it is typically recommended to also use a lead-out statement after the graphic. This is a statement that connects the figure to the material that follows.

Use titles and labels for graphics.

Include identifying detail such as illustration labels, axis labels, keys, and so on.

Make sure graphics fit within normal margins—if they don't, enlarge or reduce the copies. Leave at least 2 blank lines above and below graphics.

ATTRIBUTION

4.14 DRAWINGS, DIAGRAMS, AND PHOTOS

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; AND ANDREW STRACUZZI

To depict objects, place, people, and relationships between them, you can use photos, drawings, diagrams, and schematics.

In the realm of illustrations and photographs, the types run from minimal to maximal detail. A simple line drawing of how to graft a fruit tree reduces the detail to simple lines representing the hands, the tools, the graft stock, and graft. Diagrams are a more abstract, schematic view of things, such as a wiring diagram of a clock radio (which hardly resembles the actual physical thing at all). And of course photographs provide the most detail of all. These graphics, supplying gradations of detail as they do, have their varying uses.

FORMATTING REQUIREMENTS

When you use an illustration in a report, there are several requirements to keep in mind.

Just about any illustration should contain labels words and phrases with pointers to the parts of the things being depicted.

If the illustration has certain shadings, colors, line styles, or other such details that have a special meaning in the illustration, these should be indicated by a key or legend in an unused corner of the illustration.

Ideally, you should place illustrations, diagrams, and photos just after the point where they are needed. However, sometimes because of the pagination (the way the text falls on the pages) and the size of the illustrations, diagrams, or photos, this close placement is not possible. In these instances, you can put the graphic at the top of the next page.

Again, ideally, you want illustrations, diagrams, and photos to be between one-half to one-quarter of the vertical size of the page. You should fit them on the page with other text.

Make sure that your illustrations, diagrams, and photos fit neatly and comfortably within standard margins. You don't want them spilling over into the right or left margins. You want to allow the equivalent of at least two blank lines above and below the graphic.

Illustrations, diagrams, and photos should have titles, and these titles should be numbered (Figure 1, Figure 2, and so on). The titles and figure labels should be placed below the graphic.

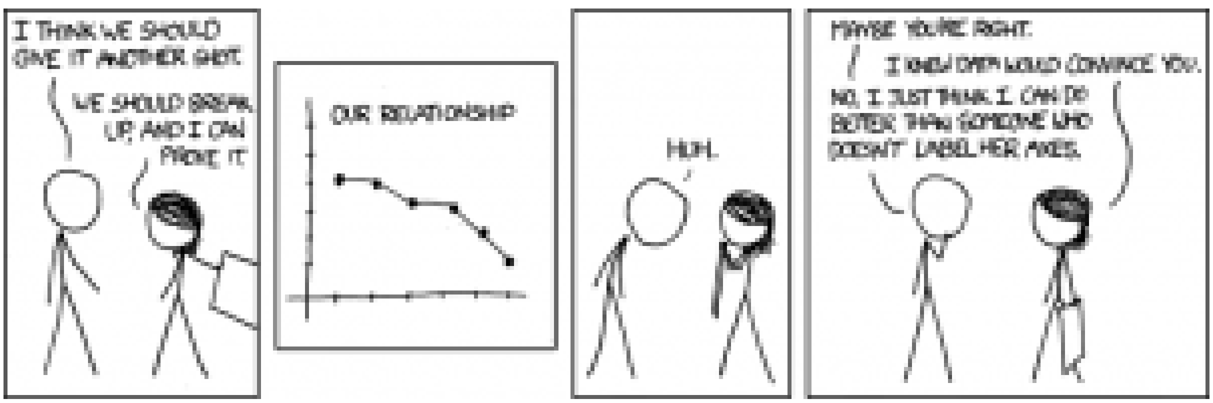
Illustrations, diagrams, and photos should be referred to from the relevant point in the discussion, and you should do more than just tossing in a "See Figure 2." Discuss the illustration to focus the reader's attention on the key details of the graphic.

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any illustrations, diagrams, and photos that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

ATTRIBUTION

4.15 TABLES, CHARTS, AND GRAPHS

JORDAN SMITH; MELISSA ASHMAN; ECAMPUSONTARIO; BRIAN DUNPHY; ANDREW STRACUZZI; STACEY TAYLOR; AND JOSHUA TOUW



If used correctly, tables and figures make data more understandable for your reader. If you use more than three illustrations in your report, provide a List of Illustrations on a new page following your Table of Contents. Tables and figures are listed separately. See the example report in Chapter 4.15. Following APA guidelines, bold the table or figure (for example, **Table 1**), double space, and italicize then place the title in italics (*Table example*). Cite the source of your data below the table or figure with the author or organization and date. We have presented one table and several figures illustrating tables in this chapter. Tables and figures are numbered separately. Note below that the first two are Table 4.14.1 and Figure 4.14.1.

TABLES

Tables are rows and columns of numbers and words (though mostly numbers). They permit rapid access to and relatively easy comparison of information. If the data is arranged chronologically (for example, sales figures over a ten-year period), the table can show trends—patterns of rising or falling activity. However, tables are not necessarily the most vivid or dramatic means of showing such trends or relationships between data—for that, you'd want to use a line graph, which is discussed in the next section.

The biggest use of tables is for numerical data. Imagine that you are comparing different models of laser printers in terms of physical characteristics such as height, depth, length, weight, and so on. This type of data is perfect for a table.

A special type of table is called a matrix. Instead of comparing numerical values in the rows and columns, a matrix compares qualitative data (words). For example, imagine that you were comparing several models of a laser printer and you want to represent various information, such as cost, print speed, supply costs, and warranty terms, for each printer being considered. This is ideal information for a matrix, and it would be mostly words rather than numbers.

Formatting Requirements

In its simplest form, a table is a group of rows and columns of data. At the top of each column is a column heading, which defines or identifies the contents of that column (and often it indicates the unit of measurement). On the left edge of the table are row headings, which define or identify the contents of that row. Things can get tricky when rows or columns must be grouped or subdivided. In such cases, you have to create row or column subheadings, as shown in Figure 4.14.1.

Table 4.15.1

Table example

Table 3. Energy production by major source from 1960 to 1980[1]					
Year	Total production (quad Btu)	Percent production			
		Coal	Petroleum	Natural gas	Other[2]
1960	41.5	26.1	36.0	34.0	3.9
1970	62.1	23.5	32.9	38.9	4.7
1980	64.8	28.7	28.2	34.2	8.9

[1] *Source:* U.S. Energy Information Administration, *Annual Energy Review*
[2] Includes hydropower, nuclear power, geothermal power, and others.

Guidelines for Using Tables

As with other types of graphics, you should refer to the table in the text immediately preceding the table. You should also explain the general significance of the data in the table; don't expect readers to figure it out entirely for themselves. If the table will not fit in its entirety after you introduce it in the text, insert the table as close as possible.

Don't overwhelm readers with monster 11-column, 30-row tables! Simplify the table data down to just that amount of data that illustrates your point—without of course distorting that data.

Don't put the word or abbreviation for the unit of measurement in every cell of a column. For example, in a column of measurements all in millimeters, don't put "mm" after every number. Put the abbreviation in parentheses in the column or row heading.

Right- or decimal-align numbers in the columns. If this convention is not followed, it can become difficult to quickly understand the size of the numbers. Figure 4.14.1 illustrates why, using a very simple example.

Figure 4.15.1

Decimal use in tables

(A)
1.23
4
6.5
1000.1

(B)
1.23
4.00
6.50
1000.10

The decimal point in (A) is at different places, depending on the placement of decimals in the number. This format makes the table hard to read. In the second row, the 4 (which has no decimal places) should be under the 1 in the first row, not the 3.

In (B), the decimal point is in the same place every time, making it easier for the reader to quickly read and understand the numbers. (B) follows the decimal-align convention.

Normally, words in columns are left-justified (although you will occasionally see columns of words all centered).

Column headings are centered over the columns of numerical data (forming a T-shape). When the table contains text rather than numbers, the column headings are left-aligned. Figure 4.14.2 illustrates alignment.

Figure 4.15.2

Word alignment in tables

(A)

Tree	Type
Deciduous	Apple
Evergreen	Balsam Fir
Evergreen	Easter White Pine

(B)

Tree	Type
Deciduous	Apple
Evergreen	Balsam Fir
Evergreen	Easter White Pine

(A) is centered in each column, which makes it difficult to read. Using the correct convention, (B) is left-aligned, which is clearer and easier to read.

Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any tables that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact below the figure using an in-text citation. You should also include the reference information in the reference list.

A video explaining how to create tables in APA 7th edition is presented here. This video includes instructions on what to include in the general, specific, and probability notes section following the table. If you are preparing a report for an undergraduate course, ask your instructor if these notes should be included.

One or more interactive elements has been excluded from this version of the text. You can view them online here: https://pressbooks.nscc.ca/profsalescommunication/?p=183#oembed-1

(Direct link to APA Style 7th Edition: Tables by Samuel Forlenza video)

CHARTS AND GRAPHS

Charts and graphs are just another way of presenting the same data that is presented in tables. At the same time, however, you get less detail or less precision in a chart or graph than you do in the table. Imagine the difference between a table of sales figures for a ten-year period and a line graph for that same data. You get a better sense of the overall trend in the graph but not the precise dollar amount. Other types of charts and graphs are horizontal bar charts, vertical bar charts, and pie charts.

Formatting requirements

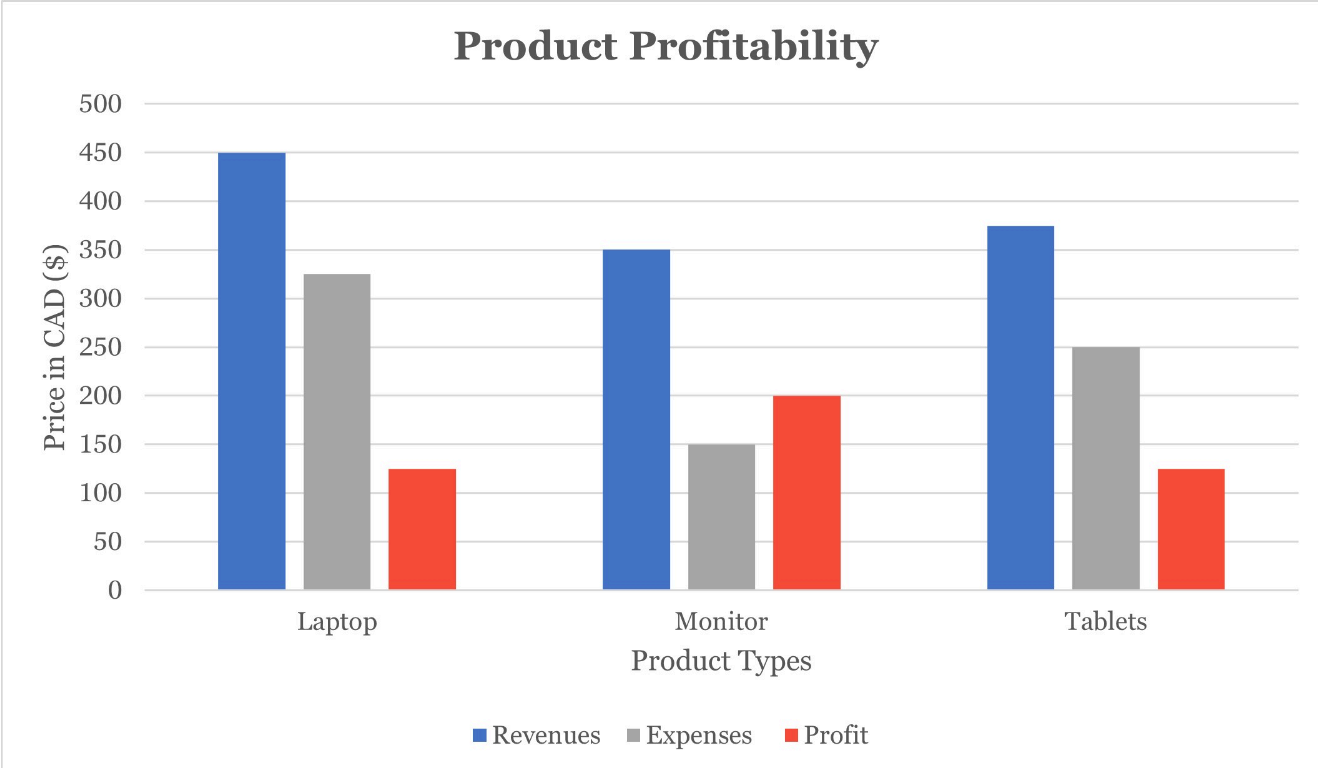
In bar charts and line graphs, don't forget to indicate what the x and y axes represent. One axis might indicate millions of dollars; the other, five-year segments from 1960 to the present.

Bar charts, line graphs, and pie charts often use special colour, shading, or line style (solid or dashed). Be sure to indicate what these mean; translate them in a key (a legend) in some unused place in the chart or graph.

As shown in Figure 4.14.3, include a title and numbered label for your charts and graphs. Include the figure number in bold. Then create a line space and include the title of the figure in italics.

Figure 4.15.3

Format for Charts and Graphs



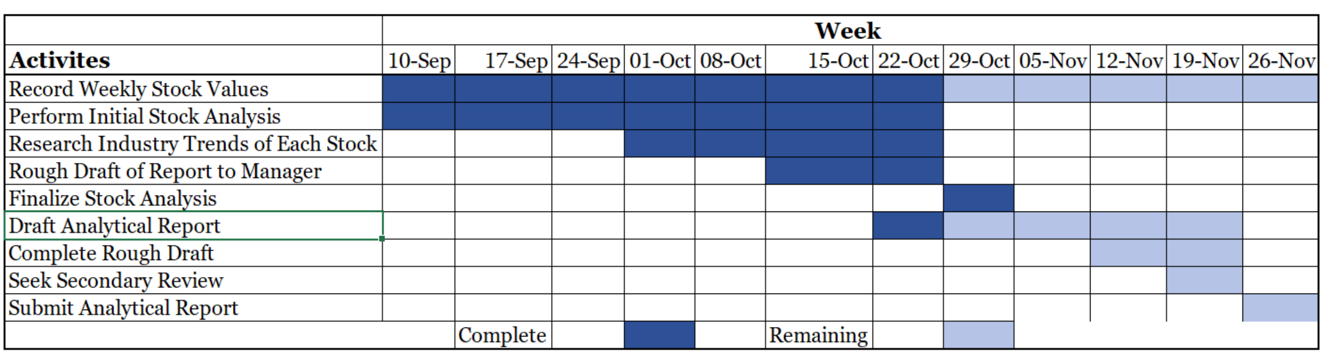
Gantt Charts

A Gantt Chart shows activities with timelines for completion. According to [Gantt.com](), on the left side of the chart is a list of tasks and across the top are dates. Times, represented by bars, show the start date, duration, and end date of each task. These charts are useful in project management because they illustrate

- What the various activities are
- When each activity begins and ends
- How long each activity is scheduled to last
- Where activities overlap with other activities, and by how much
- The start and end date of the whole project (Gantt.com, 2021)

Figure 4.15.4

Format for Gantt Charts



Just as you would cite and reference a paraphrase or a direct quote, so too must you cite and reference any charts or graphs that you use that were created by someone else or that were based on someone else's data. Indicate the source of any graphic or data you have borrowed. Whenever you borrow a graphic or data from some other source, document that fact in the figure title using an in-text citation. You should also include the reference information in the reference list.

ATTRIBUTION

This chapter is an adaptation of "Tables, Charts, Graphs" in the Online Technical Writing Textbook by D. McMurray and is used under a CC-BY 4.0 International license.

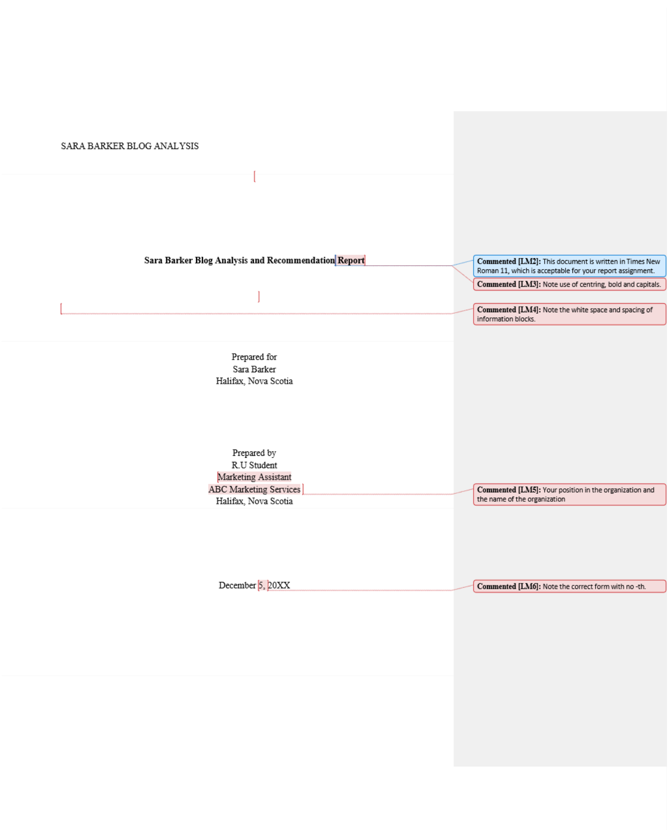
REFERENCES

Gantt.com. (2021). What is a Gantt Chart? https://www.gantt.com/

4.16 EXAMPLE ANALYTICAL REPORT

Like all reports, this sample report adheres to both internal and external standards of the course for which it was prepared. For example, the report uses APA Style referencing but not APA Style formatting; it uses 1.15 line spacing rather than the APA recommended double spacing. Because requirements within and between organizations can vary, be sure to ask your organization or your instructor for any style guidelines.

Title page



SARA BARKER BLOG ANALYSIS

Sara Barker Blog Analysis and Recommendation Report

Prepared for
Sara Barker
Halifax, Nova Scotia

Prepared by
R.U Student
Marketing Assistant
ABC Marketing Services
Halifax, Nova Scotia

December 5, 20XX

Commented [LM2]: This document is written in Times New Roman 11, which is acceptable for your report assignment.

Commented [LM3]: Note use of centring, bold and capitals.

Commented [LM4]: Note the white space and spacing of information blocks.

Commented [LM5]: Your position in the organization and the name of the organization

Commented [LM6]: Note the correct form with no -th.

Table of Contents

ABBREVIATED REPORT TITLE 2

Contents

Page

Executive Summary 3
Introduction 4
    Purpose 4
    Background 4
    Scope & Limitations 4
    Methods 4
    Key Terms 5
Findings and Discussion 5
    Energy Sector 6
        Business A (BAC) 6
        Business B (BY) 7
    Financials Sector 8
        Bank A (AB) 8
        Invest Inc. (IVI) 9
    Healthcare Sector 9
        Healthcare A (HCA) 10
        Pharmaceuticals Inc. (PI) 11
Conclusions 12
Recommendations 13
References 14

Linda MacDonald

This is a first-level heading and appears centred and bolded in "title case" (the first letters of key words are capitalized).

The use of indents for subsections clearly reflects the organizational strategy of the report.

The page on which each section begins is given, not the range.

The organization of the report is clear. This report is organized by category. The second-level subheadings are by sector. The third -level subheadings are by company.

Note that "Conclusions" and Recommendations" are plural because a conclusion and recommendation are provided for each finding.

List of Illustrations

ABBREVIATED REPORT TITLE 3

List of Illustrations

Linda MacDonald
The list of figures appears on a separate page from the table of contents if there are more than four tables or figures listed.

Tables and Figures are listed separately.

TABLES

1. Weekly Values of Sara Barker's Stock and of the S&P/TSX Composite Index 5

FIGURES

1. Title of Figure 6
2. Title of Figure 7
3. Title of Figure 8
4. Title of Figure 9
5. Title of Figure 10
6. Title of Figure 11
7. Title of Figure 12

Executive Summary

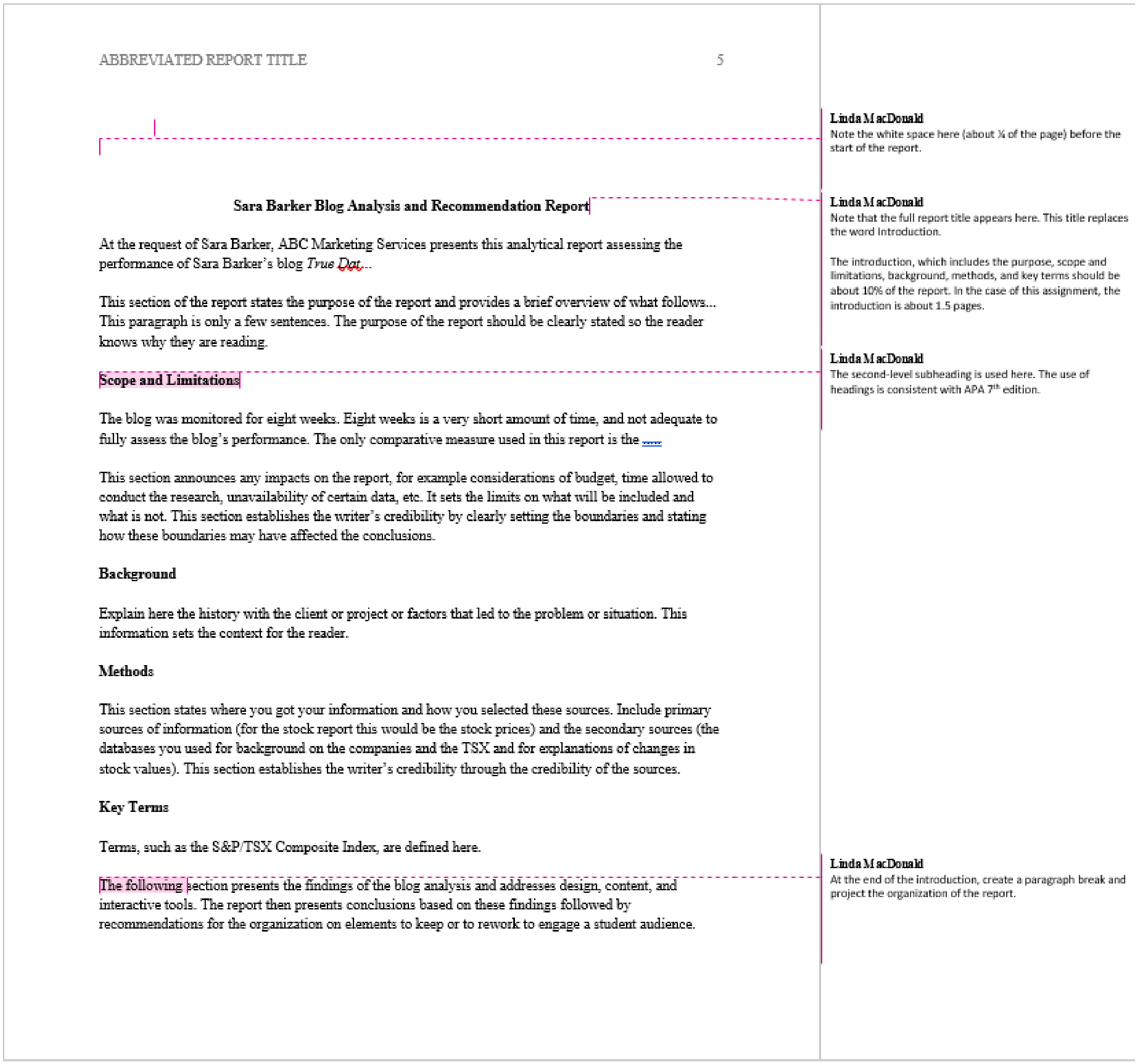
ABBREVIATED REPORT TITLE 4

Executive Summary

In this section the purpose, introduction, key findings, conclusions, and recommendations are summarized. The executive summary should be one full page. Because the focus of the report is on the recommendations, approximately a third of the page is dedicated to this section. The recommendations can be listed in bullet points.

Do not include any material that requires a reference. This page should be able to stand alone without a reference sheet.

Introduction



ABBREVIATED REPORT TITLE 5

Sara Barker Blog Analysis and Recommendation Report

At the request of Sara Barker, ABC Marketing Services presents this analytical report assessing the performance of Sara Barker's blog *True Dat*...

This section of the report states the purpose of the report and provides a brief overview of what follows... This paragraph is only a few sentences. The purpose of the report should be clearly stated so the reader knows why they are reading.

Scope and Limitations

The blog was monitored for eight weeks. Eight weeks is a very short amount of time, and not adequate to fully assess the blog's performance. The only comparative measure used in this report is the .....

This section announces any impacts on the report, for example considerations of budget, time allowed to conduct the research, unavailability of certain data, etc. It sets the limits on what will be included and what is not. This section establishes the writer's credibility by clearly setting the boundaries and stating how these boundaries may have affected the conclusions.

Background

Explain here the history with the client or project or factors that led to the problem or situation. This information sets the context for the reader.

Methods

This section states where you got your information and how you selected these sources. Include primary sources of information (for the stock report this would be the stock prices) and the secondary sources (the databases you used for background on the companies and the TSX and for explanations of changes in stock values). This section establishes the writer's credibility through the credibility of the sources.

Key Terms

Terms, such as the S&P/TSX Composite Index, are defined here.

The following section presents the findings of the blog analysis and addresses design, content, and interactive tools. The report then presents conclusions based on these findings followed by recommendations for the organization on elements to keep or to rework to engage a student audience.

Linda MacDonald
Note the white space here (about ¼ of the page) before the start of the report.

Linda MacDonald
Note that the full report title appears here. This title replaces the word Introduction.

The introduction, which includes the purpose, scope and limitations, background, methods, and key terms should be about 10% of the report. In the case of this assignment, the introduction is about 1.5 pages.

Linda MacDonald
The second-level subheading is used here. The use of headings is consistent with APA 7th edition.

Linda MacDonald
At the end of the introduction, create a paragraph break and project the organization of the report.

Findings and Discussion

Findings and Discussion

The first sentences provide an overview. In a blog analysis, this overview might be a record of audience engagement as evidenced by numbers of followers and comments. In the stock performance report, this may be a summary of investments. The table that follows would be introduced in the text before it appears.

Table 1

Weekly Values of Stock Options for Tabitha Li and of the S&J/TSX Composite Index

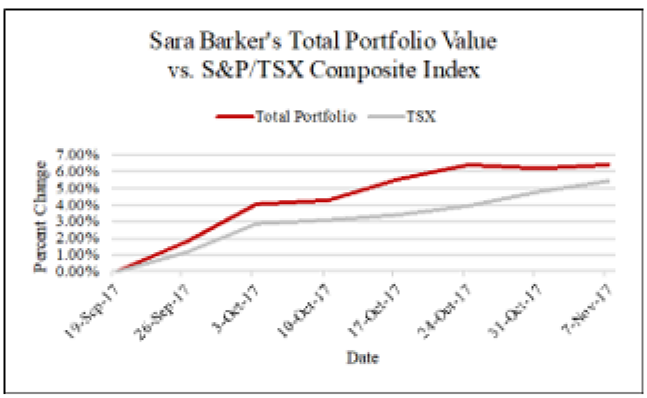
Company	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6
Company Name	$33.49	$81.55	$62.61	$68.75	$77.40	$78.18
Company Name	44.53	45.18	43.83	43.44	44.03	42.18
Company Name	72.03	71.85	67.31	70.29	71.46	67.72
Company Name	30.46	30.13	29.91	29.26	29.96	28.44
Total	$180.51	$228.71	$203.66	$211.74	$222.85	$216.52
S&P/TSX Composite Index	8,321	8,432	8,211	7,987	7,851	8.014

Source: Invest.com

Explain in text what the table shows. You might also provide an addition visual, such as the one below, to explain what the data show.

Figure 1

Weekly % Change of Sara Barker's Total Portfolio Value vs. Weekly % Change of the S&P/TSX Composite Index



Source: Factiva (2020).

Findings and Discussion, Conclusions, and Recommendations

ABBREVIATED REPORT TITLE 7

Finish the introduction of the Findings and Discussion by forecasting what follows. Your organizational strategy should be clear. For example, for a report on deforestation before and after a new policy, a chronological might make sense. If you are using a categorical approach, introduce the categories. The next subheading will be the first category.

Second-level Heading

Provide a brief statement of introduction to what follows here. A heading or subheading cannot be immediately followed by another heading. Some text should separate them. The second and third level headings use lower case with main words capitalized.

Each section under each second-level heading should be about the same length. This shows balance in your points. If you find that one section is significantly larger than another section, you may need to re-categorize your ideas, or perhaps you need to conduct further research. For example, you may wish to discuss the content, audience engagement, use of white space, font, and spacing in a blog analysis. You may have a lot to say about the audience engagement, but very little to say about font size and style. These elements are not balanced in importance. You might re-categorize your information and place white space, font, and spacing under the category of Design.

Third-level Heading

Xyz et cetera ad so on...

Conclusions

Each finding should have a conclusion. These conclusions should appear in the same topic order as the findings. The Conclusions tell what the findings *mean*. For example, if the finding is that the blog posts rarely incorporate visuals, your conclusion would be that the number of visuals is inadequate for this medium.

Recommendations

The recommendations tell what the decision-makers should *do*. The entire report leads to this section. For readability and to emphasize the actions required, use a bullet list of recommendations. Each bullet should begin with a action word. For example, you might say, "Incorporate at least one visual in each blog post to maintain reader interest."

References

References

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These examples illustrate APA form, but may not link to actual articles.

Internal standards for this course: Double space between reference items and 1.15 within, as done in this document. In true APA form, the references would be double-spaced. We are using APA referencing in this course but not APA Style formatting since your assignment is designed as a business, not an academic, document.

Linda
Example of form for journal article with a doi number.

Linda
Example of form for a newspaper article available free on the Web.

Linda
Example of form for a newspaper article from a printed publication or a library database.

Linda
Example of form for a table/figure generated in an interactive database. Provide the date of the dataset and the title you used for your table or figure. In brackets, provide a description of the table or figure.
Because you may have several figures generated by the same interactive database, distinguish between them with letters after the date.

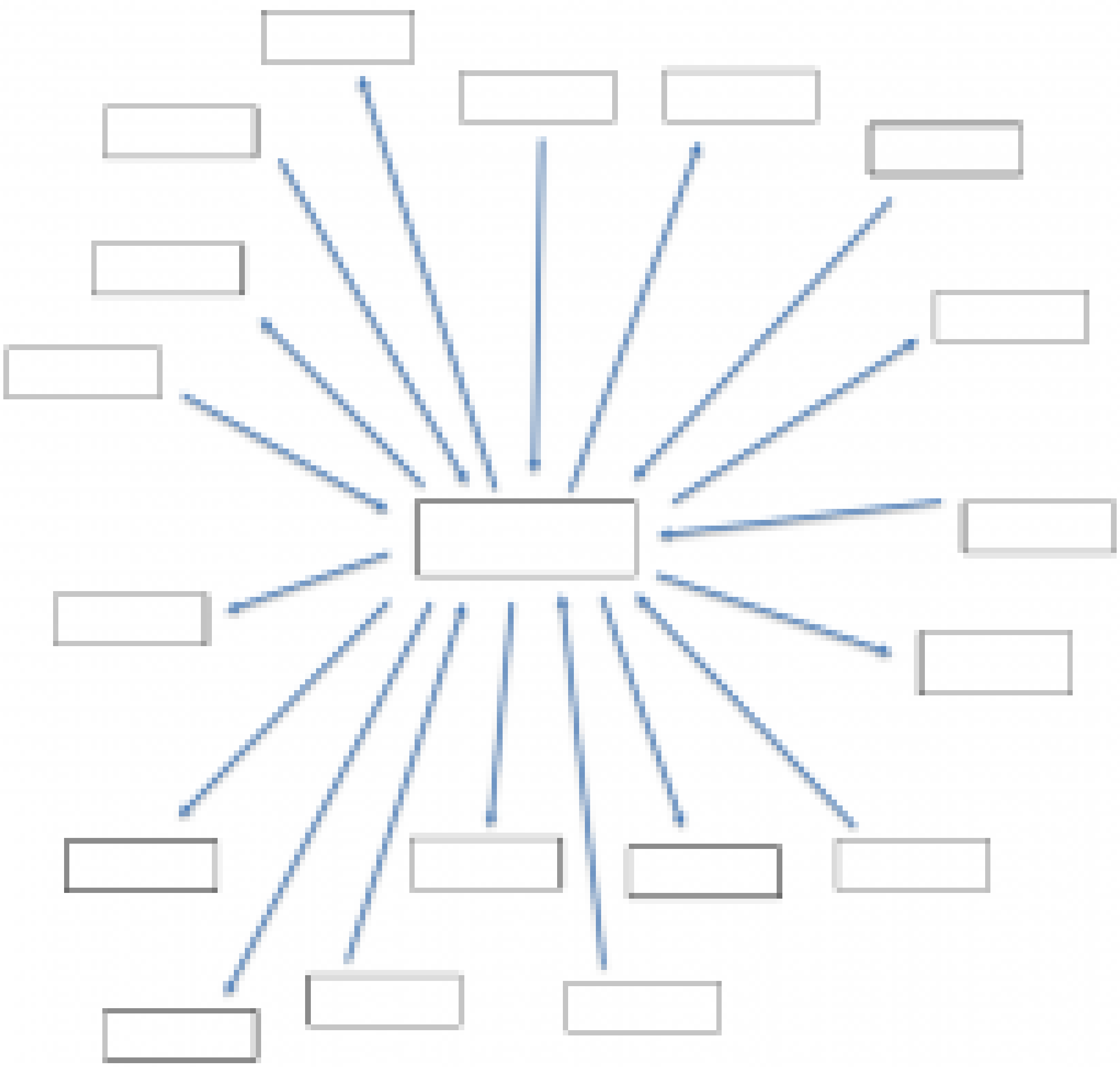
Linda
Example of form for a document from a database. You have access to professional databases as a Dalhousie student. People from outside Dalhousie, including the client audience of your report, may not have this access. If an external link to the article is provided in the article, provide the link. If the URL of the document will not take the reader to the document, provide the URL of the database home page.

Linda MacDonald
Note that hyperlinks are removed in the reference list.

HANDOUT

Starburst Identity Chart

Directions: Write your name in the circle. At the ends of the arrows pointing **outward**, write words or phrases that describe what **you** consider to be key aspects of your identity. At the ends of the arrows pointing **inward**, write labels **others** might use to describe you.



Adapted from www.facinghistory.org

VERSION HISTORY

NSCC Professional Sales Communication is adapted from Building Relationships with Business Communication by Linda MacDonald. CC BY-NC-SA.
Chapter 5 from the original book is not included in this version.

NSCC Adapted Version	Based on the Open Textbook	Web Address / URL
Professional Sales Communication	Building Relationships with Business Communication	https://caul-cbua.pressbooks.pub/businesscommunication/
NSCC Version	Resource 1	
Chapter 1	Part 1	Developing Business Relationships
Chapter 2	Part 2	Essential Tools of Business Communication
Chapter 3	Part 3	Presentations
Chapter 4	Part 4	Communicating in Writing

NSCC VERSION CHANGES

Insert Changes here …

BUILDING RELATIONSHIPS WITH BUSINESS COMMUNICATION — CREATION STATEMENT

This textbook has been created at Dalhousie University, which sits in Mi'kma'qi, the unceded territory of the Mi'kmaw people. This territory and its lakes and ocean waters, animals, plants, and trees have nurtured us with shelter, medicine, and food. We are grateful for the Mi'kmaq stewardship of the land and recognize that the Peace and Friendship Treaties, with their commitments between sovereign nations, obligate us to participate in that stewardship and to ensure that Indigenous rights to this place are upheld. This textbook aims to help students establish and maintain positive relationships through business communication. We hope this book moves us toward right relations with our Mi'kmaw partners and each other as we continue to work toward Reconciliation.

Uses both original material as well as work adapted from other Creative Commons resources, including

- *Business Communication for Success* [Author removed at request of original publisher]
- *Web Literacy for Student Fact-Checkers* by Mike Caulfield
- *Business Presentation Skills* by Lucinda Atwood and Christian Westin

- *Professional Communications* by Jordan Smith, Melissa Ashman, eCampusOntario, Brian Dunphy, Andrew Stracuzzi
- *APA Style Citation Tutorial* by Sarah Adams and Debbie Feisst

Authors are credited at the start of each chapter.

In addition, some H5P content was adapted from eCampusOntario. Authors of H5P content derived from eCampusOntario are credited within or below the H5P material.

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