

CITIZEN OF THE WORLD GUIDES

**BE  
A “PRO”  
COMMUNICATOR**

**IN EVERY SENSE OF THE WORD**

**STEELE CURRY**

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**CITIZEN OF THE WORLD GUIDES**

MAKE THE RIGHT IMPRESSION  
FIND THE RIGHT JOB & EXCEL  
BE A “PRO” COMMUNICATOR  
WHAT’S REALLY IMPORTANT

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## INTRODUCTION

# BE A “PRO” COMMUNICATOR

**The need for effective communications of all types is the foundation of success in any personal or professional endeavor. Communication also represents the fuel of all relationships. Whether it is a work associate, business partnership, friendship or marriage, the better the level of communication, the better and more long-lasting the relationship. It is that simple.**

The purpose of this book is to help you become a “Pro Communicator”, especially in your business and professional life. It encompasses the complete spectrum of different forms of communications — listening, con-

versing, meetings, written communications, electronic communications, speeches and presentations. *Be a "Pro" Communicator* also covers negotiating (which is all about communications) and dealing with the media.

In all fields, the decision to hire or promote someone in a management position is usually heavily influenced by the individual's communication skills. While other qualifications and skills are obviously relevant, the ability to listen and speak well is often the decisive factor in whether you get the job or promotion.

Personal face-to-face communications comprise much more than just what is said verbally and how it is said in terms of tone of voice and loudness. Non-verbal forms of communicating with one's body language, facial expressions and eye movements are often equally or even more important in telegraphing the position and true intent of the speaker. What people say and what they actually mean can be two different things.

If you have questions about any subjects in this book or suggestions for additional advice that should be included in future editions, please contact me through the Web site at [www.COTWguides.com](http://www.COTWguides.com). The first two books in the *Citizen of the World* series are *Make*

*the Right Impression* and *Find the Right Job & Excel*. The next book in the series after *Be a "Pro" Communicator* is *What's Really Important*.

## CHAPTER 1

# THE ART OF LISTENING

**There is a reason we were given two ears and one mouth. You do not learn anything when you are talking, only when you are listening. It is amazing how few people are skillful at listening given its importance to one's personal and professional success. The best listeners possess a competitive advantage in securing the right job, friends and mates.**

Mastering the art of listening is within the capabilities of everyone. Few individuals, however, are prepared to invest the effort and discipline it takes to do so. You cannot become an excellent communicator without first being an excellent listener.

**BE AN ACTIVE LISTENER**

The first requirement in mastering this art is being an active listener as opposed to a passive listener. This involves adopting a specific mind-set in approaching conversations with the objective of truly hearing and understanding what is being said. To be an effective active listener, you have to:

- ★ Relax and clear your thoughts. Put yourself in a receptive frame of mind to hear what the speaker wants to say.
- ★ Face the other person squarely with an open, relaxed, friendly stance at the same level, sitting or standing. Lean forward slightly. Do not cross your arms across your chest. Avoid covering the lower part of your face and mouth with your hands when you are listening or speaking.
- ★ Establish and maintain direct eye contact — not aggressive, forced eye contact but natural, gentle, comfortable eye contact.
- ★ Lock into what the person is saying right at the beginning with his or her first words. Do not let yourself get distracted. Concentrate 100% of your attention mightily on what the individual

is saying verbally and non-verbally in terms of both content and intent.

- ★ Listen with genuine empathy. Put yourself in the other person's shoes. Be sensitive to the speaker's expressed feelings and emotions.
- ★ Slow your thinking down to the pace of the other person's words and exercise patience in letting that individual finish the entire thought of what he or she wants to say. Do not be in a hurry to start speaking whenever the person pauses. Also, do not finish the speaker's sentences even if you think the other person is taking too long to say something.
- ★ Take into account that people from different ethnic backgrounds or nationalities will have different communication styles.
- ★ Watch the other individual's facial expressions, eyes and body movements for clues as to what the person really means to say.
- ★ Keep relatively still when someone is speaking to you. If you are sitting, keep your hands on top of the table or desk. Do not drum or pick your fingers.

**ANTI-LISTENING BEHAVIOR**

The most common actions that inhibit your ability to be an effective listener are:

- ★ Overreacting emotionally and personally to what is being said, especially before the speaker finishes what he or she wants to say.
- ★ Thinking about your response or next question while someone is still speaking.
- ★ Prematurely analyzing or reaching a decision in your own mind before you have heard everything the other person has to say.
- ★ Interrupting or cutting off the speaker's words with your own comments or interjections.
- ★ Looking at your watch or a clock, fidgeting and fiddling with objects such as a pen or something else in your hands or on your desk, jingling change in your pocket while someone is talking to you.
- ★ Influencing, directing or stifling what is being said with your own overtly positive or negative body language, facial expressions, nods or spontaneous verbal comments.

- ★ Tuning out what someone is saying when the person's appearance, tone of voice or conduct is not initially to your liking.

**GET IT RIGHT**

In business and professional situations, it is often necessary to seek clarification of what you hear and are being told. This is especially critical with descriptions of assignments, tasks, problems and issues. If there is any ambiguity or confusion in your mind in this regard, request that the speaker restate what he or she said. Or ask, "Can you be more specific or give me an example?" It may also be helpful for you to paraphrase back what you think was said by saying to the speaker, "If I understand you properly, you are asking me to ... Is this correct?"

Following such a conversation, if the subject was important, make notes on exactly what was said. Date and keep them. This is a valuable practice to follow whenever you are going to be held accountable for performing an assignment or project of any consequence.

To truly understand what is being said, you have to ask the right questions to get the right answers. As Rudyard Kipling said on this subject:

*I keep six honest serving men  
(They taught me all I knew);  
Their names are What and Why and When  
And How and Where and Who.*

Finally, to be an effective listener, you have to make yourself available to do so. You have to unplug from your "busy schedule" on a regular basis to ask those around you — co-workers, friends, family members — "How are you doing?" and "What's up?" If someone starts acting in an uncharacteristic manner, seems unusually quiet or is avoiding you, that is a sure sign that you need to perform some serious listening with that person ASAP.

Decide today to become a champion listener. When you master the art of listening, you will be surprised at how much all aspects of your life improve.

## CHAPTER 2

# THE ART OF CONVERSING

**Mastering the art of conversing is a key requirement for being successful socially and professionally. It also plays a big role in determining how well liked you are by others.**

Thousands of times, you are going to become involved in meeting individuals, often for the first time, who are important to you in one way or another. Similarly, you are likely to participate in countless business events, social gatherings, conferences, professional meetings and other such occasions. In all of these cases, the impression you make will be highly influenced by your ability to converse well.

## CONVERSATION MAKERS

In most one-on-one conversations, you should probably spend two-thirds of the time actively listening and no more than one-third talking. Roger Ailes, the driving force behind the success of CNBC and the Fox News Channel, was right when he said: "Most of us talk more than we need to. Most of us tell people more than they need to know. Most of us ramble too much, and most of us take too long to say things ... The moral: If most of the time you talk more than you listen, you're probably failing in your communication, and you're probably boring people, too."

Before you begin any conversation, first establish direct eye contact with the individual. Once you have started speaking, try to maintain some form of eye contact for about 85% of the time you are talking. If you are speaking to a small group, gradually shift your eye contact from one individual to others in the group, one by one. Speakers who do a poor job of maintaining eye contact run the risk of being perceived as being untrustworthy or having something to hide.

When you are speaking, keep your hands away from covering any part of your face and mouth. Refrain from making distracting movements. Do not point

your finger or anything else, such as a pen or pencil, at the person you are talking to.

It may seem ironic but the key to you creating the right image for yourself is the extent to which you express a genuine interest in other people and what they are doing, not in talking about yourself. Mastering the art of conversing depends on how well you do this.

When you begin a conversation, think about whether anything new has happened in the other person's personal or professional life that you should comment on before saying anything else. Did he recently become a new father? Did she just receive a promotion? The reality is that individuals are far more interested in themselves than in hearing about other people.

When someone starts a conversation with "How are you?", recognize that this is usually a form of greeting, not a real question.

Resist the temptation to answer by giving any details about how you really are feeling. The best response is, "Good, and you?"

In addition, people like to hear their own names. If you know someone's name beforehand, use it in greeting

that person or in introducing yourself. Afterwards, use the individual's name once or twice more in your conversation. This causes people to pay more attention to what you are saying, including in phone conversations.

To get a conversation started, ask interesting topical questions or ones that are unpredictable and thought provoking. Be imaginative. You obviously have to be careful about asking superiors or individuals in senior positions personal questions. Instead, respectfully ask their opinions about the major issues "of the day", avoiding subjects that they may find embarrassing or difficult to answer.

With everyone else, ask questions that will give the other person an opportunity to talk about themselves. Examples are: "Where are you originally from?", "When did you first come to this city?", "How does ... affect you?", "What do you think about (a news event, a business announcement, a sports tournament, a current community issue)?", "How do you know the host or hostess?", "Do you have a family?" and, if so, "What are your children doing?" Generally, most people enjoy talking about their children and pets but are not especially interested in hearing you talk at length about yours.

Do not ask tactless questions that put people on the spot or upset them, such as "Is it true that your company is going bankrupt?" or "Is your husband having difficulties with his job?" On the other hand, do not be surprised by the questions you may be asked. If you are asked an inappropriate or potentially embarrassing question, just remember that there is no rule that says you have to give a direct answer to every question. Instead, respond with an answer that goes off in another direction to put things back on a more comfortable track. You have probably noticed that politicians are especially skillful at giving non-answers to questions they do not want to answer.

Be careful about asking or answering questions about subjects of gossip and rumors. Accept that some things about another person are none of your business. To questions about a rumor relating to their company, seasoned businesspeople usually reply, "I follow a policy of never commenting on rumors."

When you are asked a legitimate question, give a direct answer that is to the point. Do not beat around the bush or give a lot of non-relevant information in answering. If you are unable to answer a question, just say, "I don't know" or "I'm not certain of that." If the

question comes from a superior, it helps to be able to add, "If you wish, I can find out the answer and get back to you on it."

The best questions are open-ended ones that engage people in talking about a subject that they know something about or find interesting. Often you will encounter individuals who seem quite shy and hesitant about talking until you get them started on an issue that is important to them. Ask about someone's adventures, hobbies or travels. Try to find out what the person enjoys doing the most and whether the two of you share any common interests.

When you become engaged in a conversation, loosen up, relax and let your eyes, body, arms and hands help you to express yourself. Show some enthusiasm, animation, emotion and conviction about what you are both hearing and what you are saying. As Roger Ailes said, "You are the message." Try to communicate with your whole being.

Demonstrate a sense of humor. Nothing relaxes people faster than laughing. Sometimes, the best humor is telling a story that pokes fun at yourself. Take a risk and tell a joke, providing it is not too long or embarrassing to anyone hearing it.

If someone tells a story about something silly you have done, join in the laughter with everyone else. Loosen up, do not take yourself too seriously. The ability to laugh at yourself exhibits self-confidence.

Be yourself. Refrain from trying to play the role of someone who is not you. Also, do not be pretentious with others. Each conversation is not a life and death situation. Just be natural.

### **CONVERSATION BREAKERS**

There are a number of easy, quick ways to bore, offend or even cause people to dislike you when you are having conversations with them. These include:

- ★ Taking yourself too seriously or lecturing someone.
- ★ Talking too much about yourself, causing people to think you are egotistical and self-centered.
- ★ Bragging and "dropping" the names of important people into your comments, implying you have a close relationship with them when you do not.
- ★ Speaking too much and trying to dominate the conversation.

- ★ Being a complainer, especially about your job, organization, family or friends. The same goes for blaming others for all of your problems and shortcomings.
- ★ Talking negatively, particularly about past relationships, employers, superiors and co-workers.
- ★ Telling jokes and stories that are offensive or include vulgar language and ethnic slurs. Save your funny, off-color stories for the appropriate audience.

Other conversation breakers are:

- ★ Always responding negatively whenever anyone proposes something or makes a suggestion.
- ★ Repeating gossip, especially to the people who are the subject of the gossip.
- ★ Describing your own personal problems at any length (except possibly in private to a close friend).
- ★ Contradicting others unnecessarily and starting arguments needlessly.

- ★ Speaking in a dull monotone and using clichés and common generalities as opposed to your own expressions and words.
- ★ Inappropriately touching or patting someone when you are conversing, especially if the other person is of the opposite sex. In some cultures, any touching of the body of another person is frowned upon.
- ★ Physically crowding someone by standing or leaning too close to that person when you are saying something to him or her. Respect the other individual's personal space. What is acceptable in this regard can also vary by culture.

### **BEING NEGATIVE OR CRITICAL**

Take special care in making a negative statement that opposes what someone else is saying or thinking. If you feel compelled to do so, exercise diplomacy and tact in your approach and wording. Do not say anything if your motive is just to make yourself look good.

When it comes to disagreeing with someone, practise the art of active listening before you decide to start

an argument. Ask questions to help ensure that you clearly understand the other person's point of view, reasoning and terms of reference beforehand.

Do not attack a person's comments in an argumentative, confrontational or personal manner, for example by saying, "You are wrong" or "I've never heard such nonsense." If you must say something critical, try to do so in a good-humored manner. Be careful not to use derogatory words that will cause someone to become your enemy. As someone once said, "I don't mind you objecting to what I'm saying as long as you're not objectionable in doing so."

If the subject of the disagreement is an emotionally charged issue, reconsider whether there is any point in challenging the speaker. Never, ever, begin to express a disagreement when your own emotions are running high. If you do so, you will have great difficulty in making the kind of calm, rational and effective points necessary to change anyone's mind. Also, never burn your bridges and say or do anything that may come back to haunt you in the future.

In turn, do not let anyone "get your goat". Some people may say things for the purpose of provoking you or to have you look poorly in front of others. Count to

ten, smile sweetly and resist overreacting to any personal criticisms, tactless comments or rejections made for this purpose. You will earn the respect of those around you by doing so.

If you want to attempt to persuade someone to change their position, try starting out by saying, "I originally thought the same thing until I heard about ... This caused me to consider that there might be an alternative way of dealing with such and such. Have you looked into this approach?"

When you want to express a strong disagreement with an individual, you are usually best off to do so in private with that person. Similarly, if you wish to correct or criticize someone, do so in private so there is no chance of the person becoming embarrassed in front of others.

To preserve a healthy, happy relationship with anyone — a friend, family member, co-worker or subordinate — you have to be careful that the majority of your interactions are not negative statements. In fact, the ratio of positive to negative comments should be a minimum of three-to-one if you wish your negative points to receive any serious consideration at all.

Finally, when you are in the wrong, admit it and apologize sincerely in a straightforward manner. Say, "I

realize I was wrong and I apologize." As you do so, look the person in the eye with your head up. Sometimes, you may have an opportunity to explain the legitimate reasons for your error or mistake. On the other hand, resist the temptation to end your apology with any "but" or "however" statements in an attempt to have the last word, otherwise you are not really apologizing.

### **OTHER ADVICE**

You have to learn to keep your thoughts on some sensitive subjects to yourself. This is especially the case with your opinions of others, including friends, co-workers and superiors. There are many people who will delight in repeating your personal opinions to the very people you expressed them about.

Refrain from letting yourself be an "open book" with anyone you do not know really well or have a reason to trust completely. You do not have to give everything away about yourself to be an interesting person and converse well. In fact, you heighten your appeal by preserving a certain amount of mystique about yourself.

You are always going to experience some conversations that do not go well or are difficult to maintain. There are also going to be times when you may unin-

tentionally say the wrong thing to someone. When this happens, do not make a big deal about it. Move the conversation forward by talking about something else or changing the subject. Everyone makes mistakes and has both good days and bad days. Do not be too hard on yourself.

When you have got something difficult or troubling to say to someone, pick the right time and place to do so. Do not start with a long preamble and try to sugarcoat what you are saying. Say what you need to say as directly, honestly and simply as you can. Also, resist waiting too long before you transmit bad news to someone. People are usually much more resilient than you expect them to be.

Last, you have to use common sense in knowing when it may not be the right time or place to say what you originally intended to say. Sometimes, it is better just to keep quiet and say nothing.

## CHAPTER 3

# **BUSINESS MEETINGS**

**In most organizations, meetings of all types consume an excessive amount of everyone's time and energy. Your challenge is to maximize your own effectiveness as a participant in meetings and to contribute to their overall productivity as best you can. When you are in a position to convene and chair meetings yourself, you will be able to maximize their usefulness and minimize the amount of time wasted by them.**

Meetings should be held as sparingly as possible. If there is any doubt about the need for a meeting, do not hold it. Meetings are unquestionably the number one time-waster at organizations throughout the world.

**ALL BUSINESS MEETINGS**

Here are some ground rules that apply to all business meetings:

- ★ Meetings should only be held to accomplish a specific purpose of some consequence. Before you convene a meeting, know exactly what results you want to achieve. The three most valid reasons for a meeting are to deal with a problem, issue or opportunity; discuss progress being made; and communicate something significant.
- ★ When you are inviting people to attend a meeting, explain the purpose for the meeting to each of the participants beforehand. If any special preparation is required prior to the meeting, make sure they understand that.
- ★ Limit the frequency of meetings and the time spent in them. Do not hold meetings to convey a false sense of involvement on the part of others. If you have a responsibility to do something on your own, do not hold a meeting to avoid your own need to deal with the issue.
- ★ Always, always be on time for all meetings, especially when you are chairing them. Keeping people waiting not only sends the

rude message that you think your time is more valuable than theirs, but also gives the impression that you are disorganized and inefficient at managing your own time. In most cases, it is best to arrive five minutes early so you can briefly greet people and get settled before the meeting starts.

- ★ Whenever you are involved in any type of meeting, turn off all cellphones, BlackBerrys, pagers and notebook computers. Extend to everyone attending the simple but important courtesy of your undivided attention. I am also not in favour of anyone taking notes on a notebook computer during a meeting as it is distracting to everyone else. In the case of meetings being held in your office or room, ensure that all other phones are turned off and have messages taken if you do not have a voice message system. In addition, try to make sure no one outside interrupts the meeting.
- ★ Avoid holding meetings on the afternoon of the last workday in the week when everyone's minds are mainly on what they are going to be doing on the weekend. Similarly, it usually is best not

to call meetings at the start of the first day in the workweek when most people are anxious to begin organizing their work for the week.

### **YOUR MEETING CONDUCT**

When you are attending a meeting, follow these practices:

- ★ Stand up whenever someone in a senior position or the person chairing a meeting first enters the room.
- ★ Watch your body language in meetings. Do not fidget, move around a lot in your chair, tap things or point at someone with a pen. Your posture should be composed and convey both self-confidence and your interest in what everyone is saying. Do not overtly look at your watch during meetings.
- ★ Listen actively at meetings. Maintain steady eye contact with the person speaking. Avoid getting distracted while someone is talking. Do not interrupt speakers. Let them finish what they have to say.
- ★ Pick the right time to make a comment or ask a question, such as when there is a pause in

the discussion and you are able to attract the attention of most participants at the meeting. If you can, prepare what you want to say, ask or recommend beforehand and have some facts or points available to support it. If you are unsure what to say or realize your thinking is fuzzy on the issue being discussed, keep silent. Also, do not feel compelled to comment on every subject raised at the meeting.

- ★ Remember, it is not just what you say that counts, it is also how you say it. Your posture, the positive sparkle in your eyes, the sense of conviction in your voice — all are critical to you truly being heard and taken seriously. When you speak, keep your hands away from your mouth.
- ★ Never lose control and let your emotions take over what you are saying, regardless of the provocation or situation. On the other hand, it is definitely OK, even desirable, to put some emotion and enthusiasm in your voice when you are speaking. If you sense that you are becoming overly emotional or losing your temper, excuse yourself from the meeting in order to regain your composure before continuing any discussion.

- ★ When meetings get deadlocked or stalled over disagreements and heated issues, do not be afraid to propose ways to resolve differences or make recommendations for everyone's consideration. Often, the most valued people at meetings are those individuals who are skillful at defusing tension and finding compromises that satisfy opposing sides.
- ★ Following any meeting at which important subjects were discussed, it is always good business practice to make your own notes on the key points to keep for future reference. This is especially important if you were assigned responsibility for any task or project.
- ★ Do not chew gum or smoke at a meeting even if you are told it is OK to do so.

One of the best ways to stand out from your peers is to take an active role in participating in the meetings you attend. Rather than just sitting there passively, ask yourself, "What can I do or say that will add greater value to the discussion and improve the quality of the decisions being made?" Avoid grandstanding when you do so.

## **INFORMAL MEETINGS**

If you want to meet with someone, it is best to go to their office to do so as opposed to asking them to come to your office. If it is impossible to have a private discussion in their office or work area, pick a neutral private office or room to do so.

When someone such as your supervisor or a customer asks you to a meeting, follow their lead in whether you take off your jacket and have something to drink if it is offered. If more than two of you are attending the meeting, try to pick the most centrally located chair opposite your supervisor or the customer but do not sit down until he or she does so.

Whenever assignments are being given to you or you are being asked to participate in a project, make certain you clearly understand what you are being asked to do. If there is any ambiguity or uncertainty in your mind, do not hesitate to ask for clarification. Often, it is a good idea for you to ask if you can give your understanding of what was said. Then, paraphrase back in your own words the instructions given to you, the expectations your superior has performance-wise, and the deadlines involved. This way any misunderstandings can be avoided.

If someone in your organization is coming to your office and you only want to hold a brief meeting, come out from behind your desk and remain standing when the other person arrives. This will signal that you want to have a short discussion so the two of you can resume working afterwards.

When you are having a sit-down meeting in your office, come out from behind your desk and sit in a chair facing the person with whom you are meeting. This will improve the chances of having an open, constructive discussion.

If someone from outside your office is coming to meet with you, either go to the reception area yourself to greet your visitor or ask someone to escort that person to your office or the meeting room. Whenever a guest comes to your office, get up and walk around your desk so you can greet that individual with a warm handshake.

### **FORMAL MEETINGS**

When you are invited to attend a formal meeting, study the agenda beforehand to determine what advance preparation you should do. Bring a writing pad and pen to the meeting so you can take notes if necessary.

Where you sit at such meetings is important to your ability to influence the meeting. Call it positioning. That is why you always need to arrive about ten minutes early. With a circular, square or short rectangular table, the best positioning is to take a chair on the opposite side of the table facing the chairperson. In the case of a long rectangular table, the best positioning is in the middle of either of the long sides of the table. If a meeting room has windows, I prefer to sit facing the windows unless the sun will be shining in my eyes.

As soon as you arrive, say hello to those you know, go into the meeting room, select your seat, and place your papers and pad immediately in front of it. Then, walk over and introduce yourself to anyone you do not know, including any special guests present, before the meeting starts. Greet people in a friendly manner with a warm smile.

If you are sitting down in the meeting room, stand up when the chairperson or any special guests enter the room. When the chairperson looks your way, smile and nod a greeting. Follow the chairperson's lead in terms of the casualness of the meeting. If the chairperson removes his or her jacket, I usually do so myself as a small gesture of affinity.

Actively listen to the people speaking at the meeting. This means looking them in the eye most of the time they are talking. If you want to speak up, wait for a pause in the discussion, raise your right hand slightly and, looking at the chairperson, say: "Mr. Chairman [or "Madame Chair], may I ask a question [or make a comment] on this?" In a less formal meeting, you can just address the chairperson by name.

If the chairperson responds positively to your request to speak, be direct and get to the point right away. Do not ramble, beat around the bush, or in effect make a speech. While you are speaking, make eye contact with the people around the table, starting and ending with the chairperson if you can. Do not be worried about being nervous when you start speaking. Lots of people are nervous when they do so. Your nervousness will usually go away.

While the meeting is going on, do not chat with the people sitting beside you. Keep your attention on whomever is speaking. If there is any chance of you having to use the bathroom during the meeting, always do so before the meeting starts as opposed to having to excuse yourself from the meeting when it is in progress.

## **VIDEOCONFERENCING**

The use of videoconferencing for meetings is certain to increase as the technology improves and decreases in cost. The ultimate goal of the suppliers of videoconferencing systems is to create a lifelike meeting experience that all but eliminates the sense on the part of participants of being in different locations. While a few such systems have recently become available, only large organizations can afford their high equipment, installation and operating costs.

Most of the previous points on meetings are also applicable to participating in videoconferences. Here are some additional recommendations to keep in mind regarding videoconferencing:

- ★ Arrive sufficiently ahead of time to enable yourself to become familiar with the control panel before the meeting starts.
- ★ For a good video image, wear solid-colored clothes. Do not wear any article of clothing that is a bright color, such as red, or has a busy pattern.
- ★ Minimize your motions and any fidgeting, such as playing with your fingers or touching your face or hair.

- ★ Speak distinctly and somewhat more slowly than you normally do. Address participants by name when you are speaking to someone and maintain eye contact when you do so.
- ★ Refrain from conducting side conversations with anyone sitting next to you.
- ★ Raise your hand to the chairperson when you wish to speak.
- ★ Avoid coughing or sneezing into the microphone.

When you are chairing a videoconference meeting, begin by introducing the attendees, stating the purpose of the meeting, and saying how long you expect the meeting to take. End the meeting by summarizing any conclusions reached, reiterating any agreed upon action to be taken, and thanking the participants for attending. Afterwards, arrange for the minutes of the meetings to be finalized and distributed to the participants.

## CHAPTER 4

# CHAIRING MEETINGS

**When you are asked to chair a meeting, it is up to you to ensure the meeting’s success. It is your responsibility to make the meeting productive, worthwhile and a positive experience for everyone involved.**

### ORGANIZING THE MEETING

Much of the success of any meeting is determined before it starts. As the chairperson, you are responsible for these actions:

- ★ Verify that there is a meaningful reason for the meeting. If not, cancel it.
- ★ Decide on the most appropriate time, date and place for the meeting. Book the meeting room. Make arrangements for any needed audiovisual

or other presentation equipment. For meetings of any length, arrange for water, tea and coffee to be available.

- ★ Determine who should attend all or part of the meeting. Sometimes, individuals only need to participate in the meeting when one of the subjects being covered pertains to them. Invite such people to join the meeting at the time that particular subject is being dealt with and then excuse them from the meeting when you move on to the next agenda item. There is no point in keeping someone at the meeting when what is being considered is irrelevant to that person.
- ★ As soon as possible, send an e-mail or written notice to everyone who should attend regarding the time, date and place of the meeting. If some of the participants are not familiar with the location, give them directions on how to find the meeting place, where to park and what other means of transportation may be available. If the meeting is not one that is held on a regular basis, advise the participants about the purpose of the meeting and the likely length of the meeting. Ask everyone to confirm with

you as soon as possible whether they will be able to attend.

- ★ Beforehand, ask the most appropriate person to act as secretary of the meeting, take notes on what is discussed, and prepare a draft of the minutes of the meeting afterwards for you to review before they are finalized. The minutes should first record who attended the meeting (as members or by invitation) and the date, start time and place of the meeting, and then describe in summary form the main subjects discussed (in accordance with the agenda), any decisions reached and any motions made and passed. Depending on the importance of an item being covered, it may be worthwhile to include some of the main points that were made or raised without attributing them to any individual person or speaker. It is not necessary or desirable to have the minutes represent a verbatim record of what was said and who said it.
- ★ Request that the secretary or note-taker pay particular attention to accurately recording in the minutes any future action that has to be taken as discussed at the meeting. Highlight

these points in the minutes by placing in bold print the term "Action Required:" before each of them.

- ★ Consult the principal attendees beforehand on what subjects they believe should be included in the agenda for the meeting. Decide on whether anyone outside of the organization should be invited to make a special presentation on a relevant matter. Prepare a written agenda listing the items to be covered in order of importance after the business arising from the last meeting has been covered. The last two agenda items should usually be "Other Matters" and "Date of Next Meeting". Below is a sample agenda to use for a formal meeting, such as one held for the board of directors of an organization.

For a less formal meeting, such as one comprising the members of a management group, the agenda does not have to include items 1, 2 and 3 above, although it is always useful to begin a meeting by welcoming those in attendance and stating the purpose of the meeting.

**Name of Meeting Group**  
**Date and Time of Meeting**  
**Location of Meeting**  
**Agenda**

1. Call to Order and Introduction of Guests [if any are expected].
2. Meeting Quorum.
3. Approval of the Agenda.
4. Review of Minutes of Prior Meeting.
5. Business Arising from Prior Meeting Minutes.
6. The Most Important Subject to Discuss.
7. The Second Most Important Subject to Discuss.
8. The Third Most Important Subject to Discuss.
9. Special Presentation [people and organization presenting].
10. Other Matters.
11. Date of Next Meeting.

- ★ Decide what materials should be sent out together with the agenda in support of what is being covered. Make sure that the agenda and supporting materials are in the hands of all the attendees five working days in advance of the

meeting. Use e-mail or the phone to get a final confirmation of whom is attending.

- ★ If you intend to call on anyone at the meeting to deal with an important subject, give that person advance notice of your intention to do so well in advance of the meeting.

### **THE START OF THE MEETING**

How a meeting starts is a good indication of its likely success. As chairperson, these points will help you get the meeting off to a good start:

- ★ Arrive for the meeting 15 minutes early. If the meeting table is long and rectangular, you have the option of either sitting at the head of the table at one end or selecting a seat in the middle of one of the two long sides of the table. The latter case positions you to have better physical control over the meeting in terms of being closer to everyone, plus encourages the attendees to be more open and less hierarchical in their participation in the meeting. Chairpersons sitting at the head of a long table are better able to establish eye-contact with whomever is speaking but are less accessible to people sitting

at the other end of the table. For other sizes of tables, sit in the middle.

- ★ Ask the most senior person attending the meeting to sit on your right side and the meeting's secretary to sit on your left side. If someone other than the acting head of the organization is chairing the meeting, the president or executive director should usually sit on the right side of the chairperson.
- ★ In the case of internal meetings, just prior to starting the meeting ask everyone to turn off their cellphones, pagers and BlackBerrys. To prevent people from fiddling with such devices during meetings, some managers follow a practice of having their subordinates put all their cellphones, pagers and BlackBerrys at the back of the meeting room on a table. A piece of tape is attached to each device where the owner writes his or her name.
- ★ Always, always start the meeting on time regardless of who is not yet present. This will send a strong message to any late-comers that they should be on time for any future meeting. If an insufficient number of attendees is present

for a quorum, the meeting can still proceed but no formal motions can be passed until you have a quorum.

- ★ Begin the meeting by welcoming any new members to the group and introducing any special guests present. Try to inject some humor in your opening comments to put everyone at ease. Your job from this point onward is to keep the meeting focused, productive and on track time-wise.

### MEETING PROCEDURES

For formal meetings, here are the procedures for the chairperson to follow:

- ★ After you have made your introductions of new members and guests, state in a firm voice, "I would like to call the meeting to order. The main purpose of today's meeting is to ... I hope to end the meeting by [state the time]. We have a quorum present (which means that the required number of attendees is present for the transaction of business in accordance with the organization's bylaws) and the first order of business is to approve the agenda. Does anyone

have any recommended additions or changes to make in the agenda?" Unless it is a major new item, most additional subjects can usually be covered under "Other Matters".

- ★ After dealing with any additions or changes to the agenda, at formal meetings the chair should request, "Would someone please move a motion approving the agenda?"
- ★ Follow the procedure after someone has made a motion (usually by saying "I move that ... " or "so moved"), of asking "Would someone please second that motion?" This is usually done by a participant saying, "I second the motion." Then, you as chair ask, "Is there any further discussion on this motion?" After which you say, "Everyone in favor of that motion, please raise your right hand." Then, you ask, "Is anyone opposed?" If a majority of those present voted in favor of the motion, you state, "The motion is carried."
- ★ When a majority votes against a motion, the chair says, "The motion is defeated." A motion is also defeated when the vote is tied. As chair, you should refrain from voting except in the

case of a tie. In that event, you have the option of voting in favor of the motion. For the chair to vote against it serves no purpose as a tie vote already means the motion is defeated.

- ★ Sometimes, as a result of additional comments made about a motion, a person may propose that the motion be amended. If there seems to be support for an amended motion, the chair should then request, "Would someone please state and move the amended motion", and call for a seconder of that motion. Following discussion on the amendment to the motion, the vote on the amended motion should be taken.
- ★ If an important decision is strongly opposed by a number of participants before a vote is taken, often the chair is better off to say, "I would like to defer consideration of this motion until our next meeting if that is agreeable with everyone." The same applies when someone, whose views should be heard before the decision is made, has been unable to attend the meeting.
- ★ Any participant who has a conflict of interest regarding a matter being discussed and voted

on should immediately declare his or her conflict of interest and be excused from the meeting during the discussion and voting on that issue. The meeting's minutes should record that the participant declared the conflict, left the meeting for the discussion and abstained from voting on that matter.

- ★ When someone is participating in a meeting by phone, the chair should always ask that person to indicate verbally how he or she is voting whenever a vote is taken.
- ★ Following the approval of the agenda, the chair should state, "The next item of business is to review the minutes of the last meeting. Does anyone have any additions or corrections to make in the minutes?" After dealing with any changes regarding the minutes, at formal meetings the chair should request, "Would someone please move a motion approving the minutes?"
- ★ After the motion concerning the approval of the minutes has passed, the chair should cover any future matters of consequence contained in the minutes and not included in the agenda, especially those marked as Action Items. This is

done under the agenda item: "Business Arising from Prior Meeting Minutes". Afterwards, the chair should proceed to cover the remainder of the agenda.

- ★ At the end of the meeting, the chair should ask: "Are there any other matters that should be raised at this meeting?" Quickly deal with any such matters and then get everyone's agreement on the date, time and place of the next meeting. When this is done, you can state: "The meeting is adjourned. Thank you for your attendance."

If you become responsible for chairing a formal meeting on a regular basis, take the time to read a handbook of *Robert's Rules of Order*, which describes generally accepted procedures for conducting formal meetings. Treat this as a guide to follow as appropriate and as a reference source in the event of a procedural dispute regarding the conduct of any formal meeting.

The extent to which the chair is required to follow formal procedures depends on the nature of the meeting. Often, the procedures to be followed by meetings of an organization's directors, members and shareholders are specified in the organization's bylaws or related

documents. At other kinds of meetings, the chair is expected to follow procedures based on precedent or past practices.

In the case of internal management meetings, the chair usually has considerable flexibility in determining the procedures to follow. It is rarely necessary for chairs of such meetings to have to declare a quorum present, approve the prior meeting's minutes or pass motions. On the other hand, it is advantageous for the chair to establish and observe a consistent set of ground rules for conducting any type of regularly held meetings.

### **OTHER MEETING RECOMMENDATIONS**

Other important practices for a chairperson to follow to have successful meetings include:

- ★ As the chairperson, definitely limit your involvement in discussions. Do not be a self-indulgent, pontificating chair. After someone has made a presentation, you may need to ask a few key questions to open up and expand the subsequent discussion. Similarly, it may be helpful for you to use several questions to ensure that people making proposals or recommendations have properly thought them

through and have considered all the logical alternatives.

- ★ One of your challenges as chairperson is to manage the amount of time being spent on each agenda item so that the meeting stays on track and ends on time. In the case of major issues, this means you have to control how much time is devoted first to presentations, afterwards to discussion, and finally at the end to determining any needed action plans and deadlines for completing them. Sometimes, you have to diplomatically end the discussion on an agenda item in order to move on to the next item. Discourage digressions from the agenda by saying, "We'll deal with that subject after the meeting or at our next meeting."
- ★ Another challenge is to encourage everyone present to participate in the meeting. If you notice someone keeping quiet about a subject on which he or she may have something to offer, ask that person: "John, do you have views on this matter?" Also, do not let anyone dominate or monopolize the discussion. Again, call for

the views of other attendees. Your objective should be to have a full and open discussion of the issues covered, including an airing of any dissenting views. This means eliciting comments and questions from all of the attendees. Pay attention to everyone's body language for clues on who should be asked to speak up.

- ★ During the course of discussions, you may find it helpful to ask someone to write the key points being made on a blackboard or large blank flip-chart pad mounted on an easel stand.
- ★ When an important decision has been made, attempt to summarize that decision as clearly as you can and ask everyone, "Is this what we have agreed to?" It also is usually advisable for the chair to clarify who is responsible for taking any required action and determine the agreed upon timeline for doing so. These matters should all be recorded in the minutes.
- ★ Few meetings need to take longer than 1 ½ to 2 hours. If the meeting is likely to last three hours or longer, call for a break of ten minutes after the first 1 ½ hours so everyone can stretch, walk

around and use the bathroom. As the saying goes, "If you keep people sitting on their behinds for too long, they'll begin to think with them."

- ★ Compliment people making excellent presentations during the meeting, especially outsiders. Wait until after the meeting to compliment individuals who have made good points in the discussions.
- ★ Sometimes, when a discussion gets especially argumentative and heated, it is a good idea to call for a ten-minute recess or break in the meeting so everyone can cool off before the discussion is resumed.
- ★ During the meeting, take your own notes on the important subjects being discussed so that you can be certain the minutes prepared afterwards properly reflect what was covered.
- ★ Ask the meeting's secretary or note-taker if you could see a draft of the minutes, hopefully within the next three working days while everything is still fresh in both your minds. Make any necessary changes to the draft of the minutes and send out the finalized minutes to all the attendees and members of your group, including those who were

unable to attend, within a maximum of ten days following the meeting. When action is required as a result of a meeting, the minutes should clearly cover that action, the identify of the person or people responsible, and any related deadlines.

If this was one of the first meetings you chaired, ask one or two of the most experienced attendees to give you some suggestions for improving the way you chaired the meeting. Take advantage of any future opportunities to chair other meetings. The more experience you get at doing so, the more effective you will become as both a chairperson and leader.

# NEGOTIATING

**Negotiations, overt or otherwise, are an integral part of everyone's personal and professional existence. In fact, most day-to-day things in life involve some form of negotiation. Like it or not, your future success and even happiness depend in part on your negotiating skill to achieve what you deserve and want.**

Negotiations at work include asking for a raise or more benefits, dealing with customers and suppliers, and gaining support from people in other departments of your organization. As you advance in management, you will become engaged in more formal negotiations where the stakes are higher.

There are four types of negotiators — mediocre, good, excellent and perpetual. Often, individuals overestimate

their negotiating ability. Only a few are innately skillful at negotiating. The difference between "good" and "excellent" negotiators is frequently dependent on the amount of time spent on research, planning and preparation beforehand. Perpetual negotiators are people who think everything is negotiable and never stop negotiating even after a deal has been reached. They are compulsive about it and drive everyone wild.

Negotiations should not be approached as a battle or contest over who can get the most from the other party. The best negotiations result in win-win agreements arrived at by both sides working collaboratively to find the optimum way of coming as close as possible to meeting the majority of each other's objectives. This is essential if the two parties are going to maintain any form of on-going medium- to long-term relationship. Unfortunately, ego and macho instincts often become an obstacle to what I call the wise approach to negotiations. Seymour Schulich, one of Canada's most successful businessmen, said he learned from his father the importance of "Don't be too smart. Don't be too tough."

While every negotiation is unique, there are certain practices, procedures and principles for you to follow to

improve your ability to negotiate a successful outcome in any large-stakes, formal negotiation. Many of these also apply to less formal and even personal situations, such as negotiating your salary or purchasing a car.

### **EXCELLENT NEGOTIATORS**

Most excellent negotiators share a number of common traits. First, they understand that the key to achieving a successful outcome is in making every effort to know more than the other side about what is being negotiated. This gives such negotiators self-confidence and credibility with both sides in supporting their positions.

Second, excellent negotiators have a great deal of empathy in understanding the feelings, thoughts and sensitivities of others, regardless of any differences in background or culture. This means they are able to project themselves into the shoes of the people on the opposing side and "read" their emotions, fears and hopes.

Third, excellent negotiators usually have a quick and easy sense of humor. They are skillful at using humor to help people relax and to defuse tense situations before negotiations become deadlocked. Such

individuals put some fun into negotiations for both sides and draw everyone together through humor. They also do not take themselves too seriously.

Fourth, excellent negotiators possess lots of patience. They appreciate the benefits of investing the time it takes to gain a fuller understanding of the other side's perspective, issues and expectations. They do not let themselves get rushed into revealing their own position nor in making concessions. They take whatever time is necessary "to do it right". To anyone in a hurry, they say, "If you don't have the time to do it right, when are you going to have the time to do it over?"

Last, excellent negotiators are not insecure and anxious to be well liked. They are comfortable with disagreement, confrontation and conflict. They have the courage to walk away if the other side makes an unreasonable demand, acts in bad faith, or is abusive.

### **BEFORE NEGOTIATIONS START**

Most negotiations are won or lost before they begin as a result of the amount of effort and time spent in preparation for them. The first issue to decide is who should be on your negotiating team. In some cases, you

may end up negotiating alone with your counterpart but for serious negotiations the best approach is to use a team of individuals to help you, even if it is only in the preparations beforehand.

It obviously is helpful to know who is going to be involved in the negotiations for the other side. Sometimes, it is necessary to use a larger number of people to assist you in preparing for the negotiations than the number who engage in the actual negotiations face-to-face. Usually, you should match both the number and qualifications of your team to those of the other side. If they are bringing a lawyer to the negotiations, you probably should too. The same applies to the use of "experts".

The second issue is where to hold the negotiations. When you are confident that your side has done a better job of preparing for the negotiations than the other side, pick a place that will make the other side most at ease. Otherwise, hold the negotiations on your premises where you are most comfortable or select a neutral location. Ideally, you want to meet where there will be the least amount of noise, distractions and interruptions. The meeting facilities should also have the required space and a proper heating and air conditioning system.

Next, you need to think through the likely pace and form of the negotiations. Here you must be sensitive to the cultural differences of the other side and adjust your negotiating approach accordingly. North American negotiators like to be direct and decisive. On the other hand, Japanese negotiators tend to proceed more slowly as they build consensus and often change negotiators at different stages in the negotiations. Similarly, certain types of negotiating behavior may be acceptable in some countries and not in others. When you are not familiar with the negotiating character of the nationality of the other side, obtain guidance from an experienced person who is.

Having determined these factors, now the real work begins. The key to a successful outcome is possessing superior knowledge than the other side about the issues and object of the negotiation. The more in-depth knowledge you have concerning each issue and everything influencing its "value", the higher the likelihood that the other side will agree with your position.

This requires utilizing every available resource to do the necessary research, including finding out what other parties did in similar situations. For example, in real estate negotiations, you need to know before-

hand what prices were paid for comparable properties and what were the range of issues determining each property's market value. Then, you can apply this information to substantiate the purchase or sale price for the negotiated property.

In the case of major negotiations, work with your team to formulate a negotiating road map outlining the full range of issues and variables to be negotiated for both sides, starting with the most important ones. With each point, brainstorm what are the options for dealing with it, what position the other side is likely to take, and what tradeoffs are acceptable in terms of giving the other side what it wants in return for what you want. Anticipate what important issues may cause a deadlock in the negotiations and what your response should be.

Be careful about your assumptions regarding what the other side will do, especially what they will or will not accept and what is negotiable. Misguided assumptions can be costly. Think of your assumptions as unproven guesses until they are actually confirmed by the other side. Start by thinking that everything is negotiable.

Determine exactly what questions your team needs to ask when the negotiations begin in order to better

understand your opponent's position and to test the validity of your assumptions. Conversely, try to anticipate the questions the other side is probably going to raise and decide how best to answer them, including what information to omit in responding.

The hardest part of any pre-negotiation preparation is to establish your objectives for each of the negotiating points involved in the transaction and your starting position or opening offer on them. Countless studies on negotiating have shown that people who aim high get more, people who ask for more get more. While you need to develop some rationale for your position, your objectives need to be set as high as possible without seeming to be foolish or greedy. There are no prizes given for "being reasonable" but there are for being creative in justifying each of your opening offers.

For every major point, you always have to give yourself some negotiating room but be cautious in establishing beforehand the specific minimum you will accept. You and your team have to be absolutely committed and tenacious about achieving your objectives. Psychologically, it is too easy for one side to back off its position when a lower level has previously been established as being acceptable.

Going into the negotiations, it is advantageous to know as much as possible about the other side's organization and its lead negotiator. Research the history and character of the other party. Use search engines on the Net to access the organization's Web site, if one exists, and to obtain any related newspaper or magazine articles written over the past three years. Similarly, try to find out as much as you can about the lead negotiator, preferably by talking to others who have had dealings with that person but also through the Net.

When both sides agree to have the negotiations follow a set agenda, try to have the agenda drawn up by your side so you can decide what is to be placed on it and in what order. If you have to use the other side's agenda, ask to review it in advance. Think through how their agenda will play out. Do not hesitate to ask that items be added or that the sequence be changed.

While everyone likes to be a hero, sometimes there is an advantage to going into a negotiation on the basis of you being able to reach agreement, subject to the final approval of someone higher in your organization. It usually is not a good idea to involve an organization's most senior person directly in a negotiation. If the other side's most senior decision-maker is directly involved in

the negotiations, however, then your senior decision-maker should also be involved.

Depending on the complexity of the negotiations, it may be advantageous to involve your lawyer or other professional advisors in preparing for the negotiations and in attending the actual negotiations. The lead role in any negotiations, however, should be played by those who have the greatest financial stake in the outcome. It is generally a mistake to let a lawyer or professional advisor negotiate on your behalf, especially if you are not present at the negotiations.

Another word of caution — there are few instances in business history when a mouse successfully negotiated a long-term, win-win agreement with an elephant. If the mouse starts to prosper under such an arrangement, the elephant ultimately gets resentful and figures out a way to put the squeeze on the mouse.

## **THE BEGINNING**

The first rule in commencing negotiations is do not start to do so until you are confident that you have completed all of your necessary preparations and research. When you are, begin by asking a lot of questions to better understand the other side's position on

the various issues involved. Seek clarifications. Probe for their weaknesses, plus what is really important to them. Test your assumptions.

Work off your list of questions prepared beforehand. Assign the responsibility for asking them to different members of your team. Be diplomatic in the manner you phrase your questions and in the tone of voice used. Do not be antagonistic or come across like an interrogator. Have someone on your team take notes on the answers. Instruct everyone not to interrupt the other side when it is answering questions. Always let people finish what they are saying.

Often the winner in a negotiation is the side that does the best job of listening, of really concentrating on fully understanding what the other side is both saying and not saying. The only time you learn anything in a negotiation is when you listen, not talk. If something is said that is unclear or ambiguous, ask for clarification or paraphrase what you think was said back to the speaker by asking, "Am I correct in understanding that you said ...?"

A Canadian business friend of mine, Lou MacEachern, was on the right track when he said that the four most important principles of negotiating are:

1. Just shut up.
2. Don't talk.
3. Listen.
4. If you are going to talk, think about it beforehand.

When it is time for you to answer questions, make sure you understand what the other side is asking. Take the time to think before responding. If you are lacking some of the information you need to answer the question, say so and indicate when you can have it available. Sometimes, you need to give non-answers or only part of an answer to a question. It is acceptable to be evasive but not to lie. With some questions, it is legitimate to say: "I'm not prepared to answer that at this time." Always refuse to answer hypothetical questions such as, "If our side were to agree to do this, would you agree to ... ?"

After each side has finished asking its initial questions, back and forth, begin the negotiations with the easy-to-settle points, not the difficult, contentious ones. It is extremely important to avoid negotiating against yourself. Move heaven and earth to get the other side to disclose its position and demands first.

This always gives you a big advantage. Ask, "What do you think is reasonable?" If you are forced to go first, table your position to the smaller issues but then ask the other side to table its position on the larger points.

To get the negotiations moving ahead on a positive track, start with points the other side can say "yes" to. Give in on the nothing points. Do not get into a battle over who is going to put the stamp on the envelope.

Be reluctant to negotiate any part of the agreement on the phone. It is too easy to make mistakes when you do not have time to think. If you have no way of avoiding phone negotiations, listen to what the other side has to say, ask questions so you fully understand its position, and then say you will call back with your response.

### **STRATEGIES AND TACTICS**

One of the leading American authorities on negotiations, Chester L. Karrass, wrote an excellent book titled *Give & Take: The Complete Guide to Negotiating Strategies and Tactics*. In it, Karrass rightly stated: "The Catch-22 of negotiations is 'dumb is smart and smart is dumb'. It is not smart to be decisive, brilliant, quick, fully knowledgeable or totally rational. You'll probably

get more concessions and better answers if you are slow to understand, less decisive and slightly irrational."

Other strategies and tactics to keep in mind include:

- ★ Try to avoid having the negotiating teams sit across the table from one another. Breaking up the seating tends to reduce barriers and improve the pace and tenor of the negotiations.
- ★ When the other side is speaking, do not telegraph your feelings and reactions with your facial expressions, nods or spontaneous verbal comments. Keep a deadpan or neutral to slightly friendly facial expression and avoid stifling, directing or interrupting the channel of conversation. This will increase the likelihood of people telling you all of what they intended to and more.
- ★ Use the power of silence to gain more information after the other side finishes speaking. If they are at all anxious, they will continue talking, giving you more information which often serves to weaken their position.
- ★ Do not back the other side into a corner or do anything to cause them to lose face. Always leave the other side a way out or a

means of saving face. Failing to do so will cause resentment and make them want to find a way to retaliate against you.

- ★ Always allow yourself time to think before you respond or agree to anything. Use frequent time-outs to give your team opportunities to discuss how the negotiations are progressing and to revise your position and tactics if necessary. When an entirely new or unanticipated demand is raised, take a time-out to discuss it with your team. If you are on your own, say you have to use the bathroom. In the case of high-stakes negotiations, when you are not meeting on your own premises, be cautious as any rooms your team is using may be bugged with listening devices.
- ★ When the other side tables an offer, consider responding by saying, "That's an interesting offer. How did you arrive at it?" The response may help you formulate your counter offer.
- ★ If you reach an impasse or deadlock on an important issue, challenge both sides to collaborate in finding a creative solution. Alternatively, suggest that everyone move onto the next issue or that a recess be taken in the

meeting. Sometimes, you may need to propose that the negotiations be continued at another time and even place.

- ★ One possible negotiating tactic for certain issues is to refuse to negotiate at all by saying, "That's not negotiable" or "I don't want to talk about that now."
- ★ If you are confronted with having to negotiate with a bully, keep calm and cool. Be firm in your response and do not allow yourself to get intimidated or become emotional. Hold your ground and insist on dealing with just the facts. When bullies rant and rave, they usually make mistakes and say things they should not.

Additional negotiating strategies and tactics to follow are:

- ★ Always try to find out all of the other side's demands before you agree to any concessions. Be slow to grant concessions on major points. Make the other side work for them. Do not grant a concession without receiving one in return. Give concessions that do not cost you much to give away. Conversely, do not hesitate to say "no".

- ★ The other side is likely to make a number of demands that are in the category of "nice tries". Recognize them for what they are and do not think you have to make any counterbalancing concessions when you turn them down.
- ★ Get creative in meeting the other side's demands. If the asking price for something is \$1,000,000, consider offering to pay that amount over a ten-year period.
- ★ Sometimes, it does not make sense to continue negotiating when there is too wide a gap between the two sides. You always have to be prepared to walk away from the table and show that you are serious in doing so. You will have the option of going back when there is a better chance of doing a more favorable deal later.
- ★ Never get angry except on purpose. Put your ego in your back pocket and do not take personally anything the other side does or says.
- ★ Do not bluff unless you have decided beforehand what to do if your bluff is called.
- ★ If you are faced with a perpetual negotiator on the other side, be firm in ending the

negotiations when appropriate by saying, "That's all we're prepared to negotiate."

- ★ Keep the momentum of a negotiation going. Do not let anyone on your team leave the negotiations until they are finished. To put pressure on completing the negotiations, sometimes it is advantageous to start them on a Thursday. No one wants to work on a weekend.
- ★ Put deadlines on your offers when it is to your benefit to do so. On the other hand, be skeptical about deadlines established by the other side.
- ★ Always use the best available lawyer to prepare and review the final agreement or contract before you sign it.

## THE AGREEMENT

In formal negotiations, both sides should make notes on what was agreed on each point as you progress in covering all of the material issues and concerns. Prior to the conclusion of this stage in the negotiations, it is usually advisable to confirm everyone's understanding of what was agreed by preparing a written "memorandum of understanding" for the

senior member of both sides to sign. This document is then used by the lawyers involved to prepare the final formal agreement or contract.

There is an adage that whoever controls the paper, controls the negotiation. Consequently, always propose that your side draft the memorandum of agreement for everyone to review and then offer to have your lawyers draw up the final agreement or contract afterwards. The objective of the memorandum of agreement should be to record all of the terms and conditions agreed to by both sides without going into small details that are not material.

Both parties should be presented with a draft of the memorandum of agreement to ensure that it accurately reflects what was agreed to. At this point, if you realize you have made a mistake in agreeing to something, face up to it promptly, apologize and say that you have to change your original decision.

In reviewing the draft of the memorandum of understanding, always work out the math on what you are paying or receiving in total cash figures. As the saying goes, do your sums using real money, especially when the negotiations included percentages figures and per unit amounts. Everyone is prone to making

mistakes so have someone else on your team double-check the arithmetic.

Be wary about doing a deal too quickly. Never let yourself get rushed into agreeing to something. Trust your instincts. If you have an uneasy sense about committing to something of consequence, pull back and ask for more time to consider it.

Similarly, be cautious about entering into an agreement that is too one-sided in your favor. Such transactions always have a way of coming back to haunt you, especially if the other party does not realize all of the consequences of what it agreed to. As Benjamin Disraeli said, "Next to knowing when to seize an opportunity, the most important thing in life is to know when to forego an advantage."

Finally, always read the formal agreement carefully and check it against the memorandum of agreement and your own notes to ensure that nothing was added, omitted or changed. If it was, you need to resolve that point as soon as possible, even if it means resuming the negotiations.

### **ETHICS IN NEGOTIATIONS**

Mutual integrity is an essential part of any negotiations and in adhering to any agreement afterwards. If

either side lacks integrity and good faith, any agreement is of limited value regardless of how well it was drafted by the lawyers.

Do not waste your time by trying to negotiate with people and organizations whose ethics and integrity are questionable. This obviously includes any party that you suspect has ties to an organized crime group. If you are unable to trust someone, do not do so. In these circumstances, you may benefit from a short-term gain but you always experience long-term pain.

Habit #4 in Stephen Covey's bestselling book *7 Habits of Highly Effective People* is "Think win/win" as there is plenty for all. Covey was once asked by Alvaro Uribe, the president of the country of Columbia, how Habit #4 might apply to terrorists. Covey replied: "You have to hunt them down and kill them. It's win-win or no deal. In this case, it's no deal."

The American electric shaving entrepreneur, Victor Kiam, was right when he said: "Though negotiations are a rough game, you should never allow it to become a dirty game. Once you've agreed to a deal, don't back out of it unless the other party fails to deliver as promised. Your handshake is your bond. As far as I'm concerned, a handshake is worth more than a signed contract. As

an entrepreneur, a reputation for integrity is your most valuable commodity. If you try to put something over on someone, it will come back to haunt you."

### THE TEN COMMANDMENTS

In summary, the ten commandments of negotiating are:

1. Research, research, research until you know more than the other side.
2. Listen! Do not talk! The more you say, the weaker your position will become.
3. Do not negotiate against yourself. Get the other side to table their demands and position first.
4. Find out what is most important for the other side and get creative in meeting it.
5. Keep in mind your end-goal. Do not get bogged down in trying to win every point.
6. Always try for a win-win deal. There is no prize for being too smart or too tough.
7. Keep the momentum of a negotiation going. Do not let anyone on your team leave before the negotiation is finished.

8. Do not be afraid of saying, "That's not negotiable."
9. Do not negotiate with people whose ethics and integrity are unreliable. If you are unable to trust someone, do not do so.
10. Try to control the paper. Offer to prepare both the draft memorandum of understanding and the final agreement for everyone's consideration.

### OTHER SOURCES

If you are ambitious about maximizing the success of your business or professional career, it is a good idea to do some additional studying on the subject of negotiating. Much of this chapter is based on the thinking of Chester L. Karrass, the director of the U.S.-based Center for Effective Negotiating. I strongly recommend that you read his book, referred to earlier, *Give & Take: The Complete Guide to Negotiating Strategies and Tactics*. Karrass has also written two subsequent books, *The Negotiating Game* and *In Business As in Life, You Don't Get What You Deserve, You Get What You Negotiate*. Another book to read is *Getting to Yes: Negotiating Agreement*

*Without Giving In* by Roger Fisher and William Ury of Harvard's Global Negotiation Project.

In addition, many colleges and universities offer courses in negotiations that will help improve your negotiating ability. Attending such courses is definitely worthwhile for anyone who is likely to be involved in protracted, complex and frequent negotiations.

## CHAPTER 6

# WRITTEN COMMUNICATIONS

**This is an intensely competitive world. To succeed, you have to stand out from the crowd. Develop the skill to express yourself clearly and effectively in writing. It will give you a strong competitive edge over 90% of your peers.**

People who write well usually do well. Most transactions and professional relationships of consequence involve written letters, memos, reports and agreements at one stage or another. Putting something in writing forces you to sharpen your logic and the clarity of your thinking. Being able to communicate well in writing with customers, superiors, subordinates and suppliers is an essential but increasingly rare business skill. One of

Apple's strongest competitive advantage is how well it communicates with its customers.

The importance of writing well applies to virtually all fields of work. Winston Churchill referred to himself as "a strong believer in transacting official business by The Written Word". The rewards of doing so are clearer direction for everyone, improved decision-making, fewer errors and less time lost as a result of ambiguity, misguided thinking and fuzziness in dealing with others.

### **BASIC PRINCIPLES**

Observe these basic principles to achieve effective writing of letters, assignments, proposals, memos, reports and business plans:

- ★ Start by asking yourself what do I really need and want to say. Then, put yourself in your readers' shoes and ask what is most relevant to them. Get clear in your mind the purpose of what you are writing.
- ★ Convey the right attitude and tone. This influences how your readers will respond to your content and message. Avoid giving the impression of being arrogant, coy, cute,

pompous, pretentious, patronizing, superior or overly humble. Above all, do not be rude or sarcastic.

- ★ Express yourself in a clear, concise, bold manner. Be direct and get to the point. Do not use ineffectual, unnecessary opening comments or statements. Avoid wordiness by trying to explain too much or cover too much detail. If it is possible to eliminate a word, phrase, sentence or paragraph, do so. The longer the document you write, the greater is the likelihood that your readers will skim over its contents superficially.
- ★ Refrain from writing and sending any form of written communications in anger or extreme frustration. It always comes back to haunt you when you do so.
- ★ Make any written apologies sincere and succinct. Do not weaken or contradict your apology by adding any "but" or "however" statements.
- ★ Always, always date every written communication and document, including all individual exhibits, charts, tables and drafts. Nothing is more irritating than being unable to

know when a written document was prepared or whether you are reading the most current version of that document. When you change or revise anything, put the new date on the document.

- ★ All written documents of any type need to have their pages numbered following the first page. Place the page number centered at either the bottom or top of each page.

Always be careful what you put in writing. If it concerns confidential information, put “CONFIDENTIAL” in all capital letters and bold print at the top of the first page of your letter or memo, or on the cover page of a report. Underline this heading in red if you wish to emphasize it even more.

Recognize that there is always a chance that any written communication or document may end up in the hands of competitors, the media or a government official. Keep this in mind when you put anything in writing, including e-mails. If you would not want to see something published on the front page of a newspaper, you probably should not put it in writing.

## **ORGANIZATION AND FORMAT**

The organization and format of your written communications help to determine their effectiveness. Follow these points:

- ★ Write what you have to say in some form of logical and coherent sequence, preferably in order of importance to your reader or chronologically.
- ★ Keep in mind that the most important sentence in any letter, document or paragraph is usually the first one. The second most important is usually the last one.
- ★ Restrict the contents of each paragraph to only one unified subject. Each sentence should relate to the same central idea being covered in the paragraph. When you go on to a new topic, start a new paragraph. Try to have the last sentence in each paragraph serve as the springboard for the next paragraph. Generally, refrain from including more than three or four sentences in a paragraph. Conversely, paragraphs usually need to comprise more than just one sentence unless you are writing a letter or e-mail. Be consistent

in the way that the start of the first sentence in each paragraph is indented.

- ★ Put lists of recommendations or anything else in order of importance or priority. Use a consistent form in giving the contents of any lists, e.g., begin each item in the list in the same way with a noun or a verb in the same tense.
- ★ When you are listing names in any form of written communications, always do so in the alphabetical order of each person's last name. This includes distribution lists of whom is to receive copies of e-mails, memos and letters as well as lists of people who attended a meeting. The same applies to any lists of organizations. To list people and organizations in any other order raises unnecessary political or status issues in the minds of the recipients.
- ★ Pay attention to how your written communications look as well as what you say. Use the appropriate style of print, spacing and margins to maximize the readability of every type of written document.
- ★ Do not use a print size and font that are difficult to read. Utilize relatively wide and

consistent margins to properly frame the printed contents of each page. The left margin should be at least one inch wide, the right margin one-half to one inch, and the top and bottom margins a minimum of one-half inch, preferably one inch.

- ★ Leave at least one-quarter to one-half inch of space between any graphic elements, such as the letterhead, the name and address, lists, charts and tables. Always indent any lists one-half inch, using bullets or numbers for each item.

Make it as easy as possible for readers to quickly find the main points you are making. Resist overcrowding your pages with too much print or information. Ask yourself, what can I do to make this letter, memo or document more readable?

## **STYLE**

The way you express yourself is critical to the success of your written communications. Incorporate these principles into your style of writing:

- ★ Write in a natural, conversational style and tone just as you talk. Be yourself. Do not put on airs. Your objective is to express, not impress.

- ★ Emphasize the facts of consequence and be careful about expressing your opinions. Do not exaggerate. It just weakens your case.
- ★ Use the active verb tense, where the subject performs the action, wherever possible. It pushes your readers along in a more direct and forceful manner. Try to avoid using the passive verb tense as it weakens what you are writing and sounds tentative. "I recommend you read this book" or better yet "Read this book" are much stronger than "It is recommended that you read this book."
- ★ Keep your sentences and wording positive, as much as it is possible to do so. Avoid using unnecessary negatives, e.g., "dishonest" is better than "not honest". Never use two negatives in the same sentence.
- ★ Use lean and short sentences and paragraphs. Try not to include more than one idea in a sentence.
- ★ Avoid using unnecessary commas. Follow the practice of when in doubt, leave the comma out. On the other hand, serious lawsuits have been caused by the misplacement of commas in

agreements and contracts. Use commas to set something apart in a sentence.

- ★ Minimize the use of semi-colons. You can use them to separate two independent clauses in one sentence but in most cases you are better off to make them into separate sentences. Semi-colons should be used to separate lists of clauses (or items) within a sentence where commas are contained within some or all of the clauses.
- ★ Try to be consistent in the use of the same pronouns and verb tense throughout. Do not switch pronouns or tenses in the middle of a sentence or paragraph.
- ★ Refrain from putting quotation marks around words or terms unless you have a special reason for doing so. The same applies to underlining them.

Having an effective writing style requires a combination of expressing yourself in a coherent, persuasive manner and using language that is appropriate for the type of document involved. What is appropriate for a business letter or communication may be different than what is suitable for an academic document.

Differences also exist between accepted American and British expressions of language and style. Adopt a consistent style of writing that suits the type of document you are preparing. In most cases, the style of writing you use should also reflect your own individual personality and character.

### **WORD USAGE AND GRAMMAR**

One of the best ways to build your vocabulary and improve your writing skills is to get into the habit of regularly reading quality newspapers and magazines, such as the *Wall Street Journal* and the *Economist*. Another way is to read books by well-known authors on a variety of subjects, including fiction. Quite simply, the more you read, the better writer you will become.

Here are some common points to keep in mind regarding effective word usage and grammar:

- ★ Resist using long words when a shorter one will do or say the same thing. The shorter the word, the more likely your readers will understand it.
- ★ With adjectives, follow Mark Twain’s advice, “When in doubt, strike out.” Similarly, delete unnecessary adverbs that essentially convey the same meaning as the verb. Avoid using

redundant little qualifiers that dilute rather than strengthen your meaning, such as “very”, “quite”, “pretty” and “too”.

- ★ Use simple, straightforward language. Avoid clichés, flowery words, technobabble, bureaucratic jargon and slang. Do not use overworked buzzwords, such as “bottom-line”, “paradigm”, “proactive”, “24/7”, “synergies” and “value-added”. The same applies to ambiguous, vague and wishy-washy words and phrases.
- ★ Refrain from including the word “I” too many times or you will sound egotistical. “I” should only be used when you’re referring to yourself in the subject of a sentence, e.g., “I am going to the movie.” Only use “we” when you’re referring to a group, company or organization to which you belong. “We” also should just be used as the subject of a sentence, e.g., “We are going to the theatre.”
- ★ The words “me” and “us” should only be used as the object of a verb or preposition and never as the subject of a sentence. For example, “He wants me [or us] to join the group” or “Between you and me [never “I”], he wants to join us.”

- ★ Use "who" as the subject of a sentence or phrase in place of "he," "she" or "they". Only use "whom" as the object of a sentence or phrase, or following a preposition, e.g., "To whom do I owe this honor?"
- ★ Do not start sentences with the words "No," "But" or "However". And, do not end sentences with "however".
- ★ To form the possessive of a singular noun or name, add an apostrophe and an "s" (horse's halter, boss's chair, Mr. Ross's hat). For the possessive of a plural noun, add an apostrophe after the "s" (workers' wages).
- ★ Do not make the common mistake of confusing "it's" and "its". "It's" is the shortened version of "it is" or "it has". When you want to write that something belongs to something else, use the possessive pronoun "its" without an apostrophe in front of the "s". The same applies to the use of "ours", "theirs" and "yours".
- ★ Insert a hyphen when two words are compounded to act as an adjective for a noun, e.g., long-term plans, low-income housing, year-end figures.

- ★ When you are referring to figures, "about" means a rough estimate and "approximately" means close to the accurate amount.
- ★ For most writing, spell out the numbers ten and under unless you are referring to dates, financial numbers or the time of day. Use numerals for 11 and up. Be careful using "M's" with numbers. One M equals a thousand in the U.S. and a million in the U.K. The same applies to numerical dates — 8/2/06 means August 2, 2006 in the U.S. and February 8, 2006 in the U.K. If you choose to use numerical dates, always be consistent in the method you employ to do so.
- ★ Avoid using "etc." at the end of a list as it always makes the reader wonder about what else you actually meant to say.

Word misuse occurs most often with the following:

- ★ The verb "to affect" means to change or influence, e.g. "The weather is affecting my mood." The verb "to effect" means to bring about or accomplish, e.g., "Inflation is effecting an increase in prices."

- ★ “Because of” means as a result of. “Due to” means attributable to.
- ★ The verb “can” means an ability to do something. The verb “may” means asking permission or expressing the possibility of doing something. “I can go to the opera but I may not do so.”
- ★ When you want to list examples at the end of a sentence, put a comma followed by “e.g.” and then another comma. Similarly, you can use “i.e.” followed by a comma in place of saying “that is” or “in other words”.
- ★ Use “compared with” to refer to the differences in two or more items of a similar nature, such as “Last year, our earnings were \$1,500,000 compared with \$1,000,000 in the prior year.” Use “compared to” to point out differences in two or more items of a basically different character.
- ★ Use the verb “to feel” to describe what you do with your hands, and “believe” for what you strongly think in your mind.
- ★ “Irregardless” is not a word. Use “regardless”.
- ★ “Principal” is an adjective or noun that means the main person or thing (the principal idea, the

- principal of the school) or a sum of money on which interest is charged. “Principle” is a noun that means a fundamental rule or basic truth.
- ★ Using “prioritize” or “strategize” as a verb is awkward. It is better to refer to the nouns “priority” or “strategy”.
  - ★ Use “such as” or “for example” instead of “like” when you give examples. Only use the word “like” as a verb to indicate you like someone or something. Also, avoid using it as an exclamatory word by itself in speaking.
  - ★ Do not use “there’s” when you should use “there are” to refer to something plural. It is wrong for someone to say or write, “There’s four factors to consider.”

Do not count on your computer’s spell-check program to flag inappropriate word usage. Most of the above examples would be missed by spell-check.

When in doubt about the exact meaning, spelling or use of a word, look it up. Consult [www.dictionary.com](http://www.dictionary.com) or use [www.onelook.com](http://www.onelook.com), a compilation of 950 general and specialized dictionaries, to obtain the correct spelling and meaning of words. For this purpose, how-

ever, I still prefer to use the latest edition of the *Oxford Dictionary* or *Merriam Webster’s Collegiate Dictionary*.

It is vitally important to follow the correct rules of grammar in all your writing. Not to do so will quickly undermine your credibility in the minds of your readers. If you are uncertain about points of grammar, you need to make the effort to become familiar with the basics of proper grammar. It is something that is relatively easy to learn. You can do so by going to a public library or purchasing a book to consult on this subject. See the last section of this chapter for specific sources of information regarding this matter.

Finally, be aware that certain professions, such as engineering or medicine, adhere to their own generic accepted style of writing and word usage, especially in the case of their own discipline-specific reports, articles and journals. If you become a member of such a profession, you will be expected to master its forms of language and expression.

### **EDIT AND REVISE**

Be a tough editor of everything you write. Hemingway rewrote the first part of his book *A Farewell to Arms* at least 50 times. Revise, revise, revise.

Simplify, simplify, simplify. If it is an important written piece, sleep on it and edit again.

The well-known authority on writing, William Zinsser, said: “With each rewrite I try to make what I have written tighter, stronger and more precise, eliminating every element that is not doing useful work.” To assist in achieving this goal, read aloud what you have written to yourself or a colleague. Rewrite anything that sounds awkward, confusing or repetitious.

Carefully proofread everything you write for spelling and grammatical errors, words omitted, typos, and mistakes in dates, numbers and statistics. Do not be lazy and try to proofread your writing on a computer screen. Always print off a hard-copy for the purpose of proofreading.

If you’re uncertain how a word should be spelled, again do not trust your computer’s spell-check program to get it right. Look up the word in a dictionary. Many mistakes are made by relying solely on spell-checks. “Stationary” and “stationery” are both correctly spelled but mean totally different things. It helps to keep a list of your most frequently misspelled words. Any error, mistake or typo in the final copy of your written communication automatically causes the reader to take you

less seriously than would otherwise be the case and undermines your image of professionalism.

### **BUSINESS LETTERS**

Your business letters represent a projection of both yourself as an individual and your organization. In all likelihood, the recipients receive countless other written communications of all types every working day. To have a chance of being read and taken seriously, all your business letters have to be well-written with care or they will get lost in the shuffle.

To produce an effective business letter, pay attention to these points:

- ★ Get clear in your mind exactly what you want to accomplish with the letter. Place yourself in the reader's shoes and ask what is most important to that person on the subject you are writing about.
- ★ Develop a logical sequence for covering the topics you need to include in your letter, based largely on what matters most to your reader.
- ★ In most cases, try to keep your letter to one page but do not use smaller than normal print size or eliminate the margin at the bottom of the page to do so. Depending on the content and

complexity of the subject, you may need to use two pages for your letter but try to avoid using three or more pages.

- ★ Put a brief newspaper-type headline in bold print centered at the top of the first page above the salutation of "Dear ... " to get the attention of the reader regarding the subject of your letter, e.g., New Product Launch.
- ★ Follow all of the basic principles of excellent writing described earlier. Do not be stiff or overly formal. Express yourself in a courteous, natural manner. Inject some of your hopefully warm and friendly personality into what you are writing.
- ★ Try to write in a concise, original and punchy style. Avoid flowery, clichéd and stock phrases. Keep your sentences and verbs in the active tense. Eliminate anything that may be of minor interest to the reader. Do not be repetitive.
- ★ Pay special attention to your first one or two sentences. They have to make the reader want to continue to read the rest. Also, avoid using "I" in the first one or two sentences.
- ★ In your final paragraph, briefly cover what you want or are asking to happen next.

Other recommendations regarding business letters are:

- ★ Always try to write to a specific person by name as opposed to "Dear Credit Manager". This is especially important when applying for a job, attempting to make a sale, or soliciting someone's support. Make an effort to find out exactly to whom you are writing. Letters addressed to departments or positions as opposed to a specific person are rarely read or taken seriously.
- ★ Ensure that you are spelling the person's and the organization's name correctly, plus using the accurate address.
- ★ Place a colon after the opening salutation of a letter when you are using someone's last name ("Dear Ms. White:"). Use a comma when you are only using the first name ("Dear Joan,").
- ★ For the signoff, use "Sincerely yours," when the salutation is by last name and "With best regards" when it is by first name. For a punchy ending, skip any "sincerely yours" and just sign your name.
- ★ If you are using someone's first name in the opening salutation, in most cases you should

sign the end the letter with just your first name.

- ★ Under the space for your signature at the end of a business letter, print your full name and below it your title. Never include your education degrees after your name unless they are professional licensed degrees, such as a CA or M.D. The same applies to other types of written communications as well as your business cards. Otherwise it makes you look pretentious.
- ★ Print out a hard-copy draft of your letter so you can proof it properly before printing the final version. If it is an important letter, read the draft out loud to yourself and think about how it will "sound" to the reader.
- ★ Always put your full name and that of your organization together with its mailing address in the upper left-hand corner of the front of the envelope.

I strongly recommend that you develop a clearly legible, distinctive personal signature. As someone said, it takes courage and confidence to have a legible signature. Do not hide behind an indecipherable scrawl of a signature.

If you have the flexibility to create your own letterhead, put it at the top of the page with your name on the top line, your organization's full "name" on the next line, your complete address on the third line, and your phone number, fax number and e-mail address on the fourth line. Try not to use more than one-and-a-quarter inches of the top margin for your letterhead. If you want to include a logo and perhaps your organization's slogan on the stationery, put them centered on the bottom of the page, using no more than three-quarters of an inch of the lower margin to do so.

### **MEMOS AND REPORTS**

Memos are used principally to communicate information, assignments and recommendations to others internally within your own group or organization. They can vary in length from one to about five pages but the longer the memo, the higher the risk it won't be read.

Reports are usually longer documents designed to contain more complete information on major subjects of some complexity or importance. They are usually longer than five pages in length and often contain exhibits, tables or other attachments.

The starting point for any memo or report is to select a short subject heading or title that grabs people's attention and succinctly telegraphs what the document is about. If you are making a request for some action or decision, use a subject heading or title that begins with "Request for ... "

To prepare effective memos and reports, you first need to develop an outline covering the main points in some logical sequence from the standpoint of your intended readers. In the case of reports, a common format or sequence to follow is:

1. The definition of the issue or problem.
2. The criteria that any solution must meet.
3. The principal points relevant to dealing with the issue or problem.
4. The main alternative solutions available.
5. Your recommended solution and the reasons for it.
6. A summary and decisive ending.

With both memos and reports, use headings and subheadings to break up the text, topic by topic, and make it easier for your readers to find the parts of

special interest to them. Be consistent in the style of headings and the use of any bold-faced print.

Use the following standard heading at the top of the first page of your memos:

	[The date.]
Subject:	[What the memo is about. Keep it short.]
To:	[The primary person who needs to read the memo. If more than one, list them one below the other in alphabetical order, by last name. Do not include positions or titles with their names.]
From:	[Your name.]
Copy:	[Anyone else who definitely needs to receive a copy.]

Lengthy reports and other business documents require a cover page, followed by a "Contents" page with an "Executive Summary" as the first section. The table of contents should give the starting page numbers for each section and at the end include a listing of any tables, charts and appendix materials contained at the back of the report. All memos, reports and other busi-

ness documents should always be dated, preferably on the first or cover page.

If you have access to the Internet, use search engines, such as Google and Yahoo, to assist in researching the subjects of your business reports. These search engines are absolutely amazing in terms of the amount of available information you can easily obtain through them.

### **HANDWRITTEN NOTES**

Handwritten notes are an excellent way to express your appreciation or congratulations to colleagues and other business associates in a personalized manner, whether they work inside or outside of your office. Take advantage of any opportunities to send such notes, including birthdays and anniversaries. By doing so, you are in effect saying, "I'm thinking about you and I don't take our relationship for granted."

Whenever someone outside of your organization takes you out for a business meal or to an event, it is usually an excellent idea to send a letter to say thank you within a maximum of three days after the occasion. The same applies if a person makes a special effort to assist you in any way. Your expression of appreciation has much more impact when you take the time to

handwrite it as opposed to sending a typed thank-you note, letter or e-mail.

When you come across a newspaper or magazine article that might be of interest to someone you know or have met, send it to that person with a signed handwritten note saying, "Thought you might be interested in the attached." Some business people use a pre-printed pad of paper headed with "With compliments" for this purpose.

If someone in a colleague's family dies, again send a handwritten note saying, "I was sorry to hear about ... Please accept my condolences. She was a great friend and will be dearly missed by everyone." Do the same with good news, such as the arrival of a newborn baby in the family.

In most cases, sign such notes with your first name. It is also a good idea to put your full name and address on the outside of the front of the envelope so there is no confusion over who sent the note.

## **OTHER SOURCES**

To improve your writing skills, I recommend that you read the latest available editions of both William Strunk, Jr.'s *The Elements of Style* and William Zinsser's

*On Writing Well*. Two other excellent books on this subject are Kenneth Roman and Joel Raphaelson's *Writing That Works* and Gary Blake and Robert W. Bly's *The Elements of Business Writing*. All of these books are quite short but contain many helpful tips.

Bill Bryson's *Troublesome Words* and Lynne Truss's *Eats, Shoots & Leaves: The Zero Tolerance Approach to Punctuation* are two additional informative, enjoyable books for wordsmiths who value effective writing.

## CHAPTER 7

# TELEPHONE AND FAXES

**The most important and effective communications are face-to-face. The next are telephone conversations. Exercise good judgment in knowing when to use different forms of communications. Do not get lazy and use the phone or e-mail to give messages to people when they are nearby.**

When you are engaged in a communication or sending a message, always concentrate 100% of your attention on that task alone until it is finished. Trying to do two things at the same time, such as checking your e-mail while you are on the phone, slows you down, causes mistakes, and divides your concentration.

Observing good manners and being considerate of others is just as important in using the telephone as they are with any face-to-face meetings. When you are on the phone, you are projecting a personal image by what you say and the tone you use, even in the way you leave messages for people not there. The first impression you make with any phone contact is likely to leave a lasting impression with that person.

### **PLACING CALLS**

To make a positive, professional impression, follow these recommendations regarding placing telephone calls:

- ★ Put a smile into your voice. Speak in a friendly, positive manner. If you are upset about something else, do not let it show in your voice, making callers think you are upset with them.
- ★ Speak directly into the phone so people can hear you clearly. Do not eat or chew anything when you are on the phone.
- ★ Use people's names when you are talking to them. It is a friendly gesture that personalizes what you are saying. If the name of the person

calling is unfamiliar to you, request that the individual please spell his or her name for you.

- ★ When you call someone, introduce yourself at the start by saying, "Frank, it's Barbara Jones calling," even if you think the other person should recognize your voice. Do not make people play guessing games about who is calling them.
- ★ If you are calling someone and want to have a long conversation, after you have introduced yourself, ask, "Is this a good time for you to talk?"
- ★ Get to the point. Resist rambling on about matters of little consequence. Do not waste people's time. Get organized with exactly what you want to say before you place the call.
- ★ Do not have anyone place your calls to other people and ask them to wait until you come on the line. This is like saying, "My time is more important than yours. It's OK for you to have to wait for me but not for me to wait for you."
- ★ Do not call people on their cellphones at work when they have a regular office line unless

they requested that you do so. If someone's business card includes a cellphone number, you can call that number after the person does not answer his or her regular office line.

- ★ If you want to reach a senior person at an organization and you are concerned about getting past his or her secretary, try calling that individual's direct line after normal business hours when the secretary will likely have left the office.
- ★ When you are calling long-distance and someone other than the person you are calling answers the phone, say, "This is [your name] calling long-distance for [the other party's name]." This usually increases your chances of getting through to the individual you want to speak to.

### **TAKING CALLS**

Keep these points in mind concerning taking calls:

- ★ When you answer the phone in your office, say your first and last name in a friendly, business-like tone and then wait for the caller to begin. If you are answering the main phone number for

your organization, first say "Good morning" or "Good afternoon", state the organization's name, briefly pause, and then say "How may I help you?" Always try to answer the phone by the third ring.

- ★ Answer your own phone when you are in your office by yourself and not tied up working on something. Do not have anyone screen your calls, saying, "Who's calling?" It just slows everything down and raises unnecessary questions in people's minds about you taking some calls and not others.
- ★ Do not encourage anyone to place personal calls to you at work unless it is an emergency. Absolutely minimize the personal calls you make at work, except during your lunch break. Do not place personal long-distance calls at work and charge them to your organization.

### **LEAVING MESSAGES**

Here are some suggestions regarding phone messages:

- ★ When you are leaving a voice message for someone you are calling, say, "Frank, this is Barbara calling. Could you please call me back

at [give your phone number]. It's 12:30 P.M. on Wednesday, June 4th." Sometimes, it is also helpful to mention briefly the reason for your call. Do not talk too quickly in giving your name or in leaving a message.

- ★ Speak especially clearly and slowly when you are giving your phone number in a call-back message. It is also a good idea to repeat your call-back number at the end of your message to make it easier to understand. Sometimes, it is helpful to include in your message the optimum date and time that you will be available to take the returned call. Banish the non-words "uh" and "umm" from any messages you are leaving. Keep your message short.
- ★ Use a voice-message system or answering machine to let callers know they have reached the right office when you are not there. Be concise in your recorded message, saying, "You have reached Barbara Jones's office. Please leave a message and I'll return your call as soon as possible." If you are going to be away from the office for an extended period, either include in your message when you expect to

return or have someone check your messages and phone back to advise those callers who need to know when you will be returning and to ask them if someone else at your organization can help them in the meantime. Program your voice message system or answering machine to activate itself after the third ring.

### **TELEPHONE MANNERS**

Your manners on the telephone are important. Always be courteous and professional by practising the following principles:

- ★ Return all phone calls promptly, at the absolute latest within two or three days.
- ★ Do not be abrupt, rude or sarcastic on the phone. Avoid talking too loudly. It does not help you make your point.
- ★ Be an active listener. Let callers explain why they called. Do not interrupt or cut someone off when the other party is speaking. Also, refrain from monopolizing the conversation.
- ★ Only use a speakerphone when you need to involve someone else in your office in the conversation. When you do, say, "Frank, I'm

going to put you on speakerphone so Alice Smith can participate in our conversation."

- ★ Avoid keeping people waiting on hold. If you have to do something else or find a file to continue the conversation, say, "Barbara, I'm sorry. Can I call you right back?" Never keep someone on hold for more than 30 seconds.
- ★ Do not prematurely end a phone conversation with anyone to answer another incoming call. Let your voice-mail system take the message.
- ★ If you are on a call and it gets disconnected, the person who originated the call is the one who should call back to continue the conversation. The exception is when you are talking to a client or customer, in which case you should call back.

## MEETINGS

Observe these points concerning telephone calls and meetings:

- ★ When you are engaged in any kind of formal meeting, always have your calls held and shut off the ringer. Answering calls when you are in a meeting negatively affects everyone's

productivity and concentration, plus again says "My time is more valuable than yours."

- ★ If you are going into a meeting and have no choice but to take an important call that may occur while you are meeting, explain the situation to everyone at the start and ask their permission for you to leave the meeting to take the call when it comes through.
- ★ Shut off all cellphones, beepers, pagers, BlackBerrys and any other PDA's whenever you are in a meeting. Do not leave their ringers on "vibrate". Concentrate 100% of your attention on the meeting.

One final point of caution — whenever you are dealing with anyone on the phone about a business transaction or real estate matter and that person is an agent, broker or middleperson who may receive a fee from the transaction, always be careful about what you say, agree to do, or authorize. Afterwards, carefully document in writing exactly what was said and the date and time of your conversation. The same applies to any meetings where such matters are discussed. Share your notes soon afterwards with your colleagues

so everyone is aware of what transpired and has an opportunity to add or object to what was covered.

## **FAXES**

Surprisingly, the use of fax messages has continued at a high level despite the advent of e-mail. Faxes are ideally suited to sending detailed information, documents and printed material that cannot be sent by e-mail because of their confidentiality or length but need to be received right away. Faxes can also be used for sending and returning agreements and contracts that need to be signed. As e-mail recipients become more hesitant about opening any e-mail attachments, fax usage may even increase.

Unless you know someone is standing by the fax machine waiting to receive your document, always use a standard cover page with all faxed messages. The cover page should have the recipient's name on it [To: Barbara Jones] and contain your name, your organization's name and all of your contact information, including mailing address, phone number, fax number and e-mail address. The cover page should be dated, have a subject line and indicate the total number of pages being sent, including the cover page. In addition,

the cover page should have a designated space for you to write a brief message to the recipient, including any action you are expecting to be taken with the faxed message, such as "Could you please get back to me re: the attached."

When you are faxing anything of a confidential or sensitive nature to someone in an office where the fax machine is likely also used by other people, call the recipient beforehand so that individual has an opportunity to stand by the fax machine as your message is being received. If you mistakenly receive a fax intended for another person, send the fax either to that individual or back to the sender with a note saying you received it by error. You would appreciate the same treatment if this happened to you.

In the case of sending faxes of some importance, it is always a good idea to call the recipient afterwards to confirm that the person actually received your fax. This especially applies to larger organizations where the odds of your fax being misplaced are higher.

# **E-MAIL AND INSTANT MESSAGING**

**E-mail usage is growing exponentially worldwide. Unless all users start exercising much greater discipline in determining when to send an e-mail, its popularity is going to be self-defeating as the rising number of e-mails is becoming a massive drag on productivity. While spam or junk e-mail is part of the problem, the ease of sending e-mail is generating a high proportion of inappropriate messaging.**

## **BASIC PRINCIPLES**

Avoid getting swamped by e-mail and letting it totally disrupt your productivity. Develop a daily routine for dealing with incoming e-mails. Get into the

habit of only checking and responding to your e-mail at three set times every day — for example, at mid-morning, then again just after your lunch break, and finally just before the end of your workday. Save the start of your day, when you are freshest, for planning your schedule and working on high priority tasks. Unless you want to become an e-mail slave, switch off the alert or ping that announces you have a new e-mail.

Just as is the case with handling incoming mail and other hard-copy materials, try to deal with each e-mail decisively at the time you first read it. Answer it, transfer your reply together with the original message to a designated subject file if you are reasonably certain you will need to refer to them again, or delete it. If for some reason you are unable to respond immediately, transfer the e-mail message to a "save file". At the end of the day, clear your deleted files. In some cases, you may need to retain or print out a hard-copy of certain e-mail communications (or just their attachments) for either a working file or your permanent files.

Create folders and sub-folders on your computer, organized and listed by priority, sender or subject, for storing e-mails that you want to retain or return to

later. Purge these files at least once a month so they do not become unwieldy. You can also program your e-mail software so incoming e-mails automatically go into these folders.

Keep in mind that e-mail software employs an internal file system that is notoriously unreliable, especially when messages and attachments accumulate. Save e-mail attachments "outside" of your e-mail software in external folders (that are part of your computer's native file system) with copies safely stored in separate project files. Then, remove the original attachments from the messages. This will preserve your record of important attachments.

Storing attachments and other typical working documents in conventional folders ("outside" of the mailer database) makes them easier to back up. It is also critical to backup your e-mail database to preserve important messages.

Business e-mail is ideally suited for sending short messages, critical information and follow-up reminders, for confirming something has been done, for asking brief questions, and for organizing meetings. E-mail speeds up the communication and decision-making process, eliminates the wasted time of "phone

tag", and makes distance and time differences irrelevant. E-mail also significantly reduces long-distance telephone and fax charges.

Exercise extreme caution about what you say in your e-mails. Never include anything of a confidential, controversial or sensitive nature in an e-mail as there is always a risk of your e-mail ending up in the wrong hands through error or some computer malfunction. You cannot control who sees your e-mails after you have sent them. If you would be embarrassed to read your e-mail on the front page of a newspaper or posted on your organization's bulletin board, do not send it. Also do not assume that e-mail messages are private. Practice "safe e-mail".

In many jurisdictions, both business and personal e-mail messages can be retrieved from your computer and introduced as evidence in court hearings. The technology now exists to recover all electronic conversations, including deleted e-mails and encrypted messages. As John Battelle, a *New York Times* technology journalist, stated, "Our tracks through the digital sand are eternal."

Many larger organizations have implemented e-mail archiving and retention policies involving the index-

ing and storing of messages for a given period before their deletion. Legislation is being adopted in the U.S. and elsewhere requiring companies to treat e-mail in the same manner as paper documents. If your organization does not have its own e-mail archiving policy, establish your own system for the storage of all e-mails relating to contractual, financial, legal and technical matters.

Increasingly, employers are using various types of software to monitor employee computer use of e-mail (both incoming and outgoing), Web site visits, and the downloading and deletion of files and data. The software is programmed to check e-mail messages and electronic files against a list of keywords, including inappropriate language, profanity, sexual terms, and industry-specific terms that might indicate an ethical or security problem.

Recently, the CEO of Boeing was fired for having the bad judgment of using the company's e-mail system to send explicit messages to a female employee with whom he was having an affair. Whenever you utilize your computer at work or any other company equipment for personal uses, you are exposing yourself to criticism or worse. To be safe, refrain from using your

office computer or company e-mail account to send any personal e-mails.

E-mail is a hot and fast medium. It encourages people to “say” things that they would not say in person, including being more aggressive or intimate than they otherwise would be. Avoid responding to e-mails in anger or when you are in a highly emotional state. If it makes you feel better, type up the message but do not hit the send button. Also, do not use e-mail to communicate bad news, such as layoffs and terminations. Most of the time, bad news should be delivered in person. The same applies to serious apologies and major criticisms.

Always follow the rule — when in doubt, do not send the e-mail out. Otherwise, you are being inconsiderate of other people’s time. Ask yourself, does the prospective recipient really need to receive this message or a copy of it? Is it truly relevant and necessary? Would you yourself like to receive such an e-mail? Be especially careful about automatically sending messages and copies to everyone on a set distribution list with the Reply to All button. If you use distribution lists at all, keep them up-to-date.

Try to respond within a maximum of three days to those e-mails requiring an answer, unless you are away from the office. If you are going to be away for any length of time, leave an automatic reply message, stating that fact and when you will be back. A late or even a brief, disappointing response is better than no response.

Resist sending back unnecessary responses to e-mails, such as “thank you” or “I will do it” as opposed to waiting until you can say, “I have done it”. Most one- to three-word e-mails waste people’s time. Categorically, do not add to e-mail clutter by sending out unsolicited jokes, chain letters or “thoughts for the day”. Similarly, do not send any e-mails containing sarcasm, rude statements, offensive material or any type of coarse or sexist language or images.

Do not be lazy. Refrain from using e-mail to deliver messages that are better delivered in person, especially with individuals who are located nearby. Any contentious issue is always best handled in person. E-mails are also not appropriate for personal expressions of condolences. Conversely, do not say anything in an e-mail that you would hesitate to say in person.

## SENDING E-MAILS

Here are some other recommendations to follow:

- ★ Remember that you are conveying an image of yourself with each e-mail you send out. Use a friendly, courteous, professional "tone of voice" in writing your e-mails. The tone of an e-mail heavily influences how the recipient will interpret the words contained in the message, just as your body language colors what you say verbally. Do not place "Re:" at the start of the subject line as it is redundant.
- ★ Pay special attention to the subject line. It should telegraph the purpose or subject of your message to the reader as does a newspaper headline. Avoid subject lines that risk being categorized as spam as a result of containing generic statements (e.g., "Hi", "Great News", "How Are You?", "Quick Question" or "Thanks"), all capital letters or the recipient's name. Never leave the subject line blank. In sending a reply to an e-mail, it is often advisable to change the subject line to make it more relevant to the specific content of your reply as opposed to

continuing with a subject line more applicable to the entire original e-mail message.

- ★ Ask yourself what is the boiled-down essence of what you want and need to say. In doing so, put yourself in the shoes of the recipient of your intended message. Avoid sending lengthy e-mails. If you want to cover more than one main subject, send separate e-mails for each of them with different appropriate related subject lines.
- ★ Start your message with a friendly greeting, such as "Hi Barbara:", using a colon after the greeting. If you are e-mailing someone for the first time, refrain from assuming a familiarity that does not exist. Start your message with "Dear" before the person's name, as you would do in a business letter. With subsequent e-mail messages, you can drop the use of "Dear" and just put the person's first name if you do not want to say "Hi" before it.
- ★ Avoid continuing an e-mail chain of more than three or four related messages and responses, especially if any of them is lengthy. Start a new e-mail in responding when this happens.

- ★ Create an attachment for sending detailed or complex information of any length. If you are thinking of sending an attachment of significant length or multiples of more than three attachments, ask by e-mail or phone beforehand how the recipient would like to receive them — by e-mail, fax or in the mail. In most cases, send long attachments by mail or fax. Many e-mail boxes have size quotas that fill up quickly. If one of your messages get bounced, let your recipient know that his or her mailbox is full.
- ★ Send large attachments through secure public folders accessible on the Web. A variety of free and commercial online services offer this convenience. As a courtesy to your e-mail correspondents, include a Web link to the online folder in your e-mail message. You can also transfer large files with conventional FTP (file transfer protocol) which is widely available.

### **E-MAIL CONTENT**

Keep in mind these points regarding the content of your e-mails:

- ★ Next to the subject line, the first sentence is the most important. State the purpose of your e-mail. Get to the point right away. Be concise and direct. Keep the message simple and straightforward. Only include what absolutely needs to be included.
- ★ Make the style of your writing less formal and stiff than a typical business letter. Express yourself in a more conversational and personalized manner.
- ★ Use short sentences and paragraphs. Put a space between paragraphs. Use the active verb tense wherever you can and be consistent with the tenses used in each paragraph. Try to minimize the use of the words “I”, “me” and “myself”.
- ★ Do not use all capital letters in writing your message as it is the equivalent of yelling at someone. Use capitals for the first letter of the first word in sentences as you would in other business communications. Also, capitalize the first letter of each of the main words in the subject line.
- ★ Make an effort to avoid spelling and grammatical mistakes as they make you look sloppy. Do not

trust spell-check to catch typos or wrongly spelled words. Check the accuracy of figures and dates.

- ★ Refrain from abbreviating words, such as through ("thru"), night ("nite") and please ("plse"). It is a form of laziness to do so. Similarly, avoid using the abbreviated terms commonly utilized in text messaging, such as TTYL, UR, TXH and L8R. These are too informal for e-mail use and any business communications.
- ★ Use exclamation marks sparingly if at all.

### **E-MAIL CAUTIONS**

Some cautions to take to avoid experiencing problems with your e-mails include:

- ★ Always reread your message before you hit the send button. If it is an important message of any length, print out a hard-copy to proof it properly before sending your message. Better yet, avoid sending any long e-mail messages.
- ★ For new messages, get into the habit of typing in the receiver's e-mail address only after you have finished writing and proofing your message. This will reduce the chances of you sending the

message prematurely before you have eliminated any mistakes or unnecessary content.

- ★ Before forwarding an e-mail message you received to another person, ask permission of the sender to do so.
- ★ With important e-mails, either include a last sentence saying, "Please confirm you received this message" or use the confirm pop-up available with some e-mail systems.
- ★ Distribute copies of messages sparingly. On the other hand, it is often a courtesy to "CC:" a third party to keep them informed about a conversation or development of consequence.
- ★ When you have to distribute messages to a specific group on a regular basis, rather than display all the recipient names individually, create a "group" in your address book and ensure that your mailer is set to suppress individual recipient names. This will avoid having disreputable e-mail address "harvesters" turn your recipients into spam victims.
- ★ Refrain from sending movies, slideshows, music, large numbers of photos and other media files, including PDF's and PowerPoint

documents, by e-mail. Such large attachments will clog up your recipients' mailboxes. Limit attachments to 1 to 2MB in size and ask when in doubt about sending a larger attachment. Send URLs instead and employ alternate file transfer methods.

Do not use e-mail to convey any "message" of an emotional, confrontational or controversial nature. Regardless of how unpleasant it may be, such matters should be communicated in person or, at minimum, on the phone to avoid any misinterpretation. Doing so also provides an opportunity for clarification or modification on the spot, depending on the other person's reaction.

One of the most frequent irritants occurs when someone e-mails a message to a large group with a question, such as "Can you all attend a meeting at this time and date?" and the members of the group send their individual responses by hitting the Reply to All button. When you are replying to an e-mail message and want to ensure that your reply is only sent to the individual sender and not to everyone else to whom the original message was sent, "forward" your message

back to this person to be considerate of the other recipients who do not need to be bothered by receiving your response. This is definitely necessary when the Reply to All button automatically pops up after you hit the Reply button.

### **SIGNING OFF**

When you sign off, consider the following:

- ★ For most business e-mails, sign off by simply putting your name at the bottom of the message unless you want to be more friendly by using "Best regards," with your name underneath. If you are uncertain how to sign off, "mirror" how the recipient signs off his or her e-mails to you.
- ★ Create a standard e-mail auto-signature to place below your message and name sign-off that gives the same information as a business card with your full name, position, mailing address and other contact information. It is especially helpful to include such an auto-signature when you are not well-known to the recipient of your e-mail.

**COMPUTER SECURITY**

Viruses are increasingly attacking computers via e-mails. To avoid damage to your computer and computer files, never open attachments contained in e-mails sent by anyone you do not know. Even with a file attached to an e-mail from a relative or friend, confirm that they actually sent it if you were not expecting the e-mail or attachment. Delete chain letters and junk e-mail without forwarding them to anyone else or replying to them. Regularly update your anti-virus software.

The increasing availability of mobile wireless access (WiFi) to the Internet, e-mail and corporate networks in airports, hotels and other locations raises serious security concerns. Unless you follow proper encryption and password procedures, there is a risk that other users in the same area can log on to your laptop or PDA and access your e-mails and other computer information.

Use passwords for your e-mail and other computer accounts that are difficult for hackers to crack. The most secure passwords are those that are a random combination of at least eight numbers, punctuation marks and upper- and lower-case letters. Do not use

birth dates or the names of your children and pets. Your business-related passwords should probably be changed every 30 days and your ones for personal use every three months. Be especially careful in the passwords you use for those Internet sites where you are providing your credit card details or other financial information. Do not write your passwords down and leave them anywhere near the area where you regularly use your computer or PDA.

Finally, some organizations insist that all e-mails sent by their members have a standard statement at the bottom in the event the e-mail ends up in the wrong hands. The wording of these statements is generally:

*This message and any attachments are solely for the intended recipient and may contain confidential or privileged information. If you are not the intended recipient, any disclosure, copying, use, or distribution of the information included in this message and any attachments is prohibited. If you have received this communication in error, please notify us by reply e-mail and immediately and permanently delete this message and any attachments. Thank you.*

**INSTANT MESSAGING**

The use of instant messaging (IM) and mobile text messaging is becoming increasingly popular as a faster, briefer, real-time alternative to e-mail, especially via cell-phones and other PDA's such as BlackBerrys. While IM speeds up business communications and is much cheaper than long-distance phoning, it is frequently misused.

Keep in mind these points when you utilize instant messaging (or text messaging) at work:

- ★ Restrict your use of IM to extremely brief business matters. Do not use IM to chat or gossip with friends and business colleagues during working hours.
- ★ Remember that many organizations maintain logs of instant messages. While your organization may not, the other party's employer may be monitoring your IM's.
- ★ Do not be lazy and use IM when you should be communicating in-person, via e-mail or on the phone regarding anything of consequence.
- ★ Refrain from being overly casual or too familiar with supervisors and managers in your instant messages.

- ★ Always "speak" in a friendly, courteous manner. Do not be flip or sarcastic in your IM responses.
- ★ Start your IM conversation by asking, "Are you available now?", before sending a long question or comment.
- ★ Resist the temptation to interrupt the other party by typing an answer when that person is still in the process of replying to your prior message.
- ★ Refrain from using abbreviations in your business instant messaging unless it is common practice to do so in your organization.
- ★ Do not send or receive instant messages during meetings of any type. Also, turn off the IM ringer when you are in meetings or engaged in tasks that require your full attention.
- ★ Do not send business-related IM's or text messages to anyone between 6:00 P.M. and 8:00 A.M. or on weekends.

Given the relative newness of instant and text messaging, the proper protocols for using them are still evolving and vary considerably from organization to organization.

# **SPEECHES AND PRESENTATIONS**

**The vast majority of people have a greater fear of having to give a speech before a large group than almost anything else. While your first instinct will be to go to any extreme to avoid giving a speech, your career will greatly benefit from you doing the reverse.**

Organizations highly value those individuals who do an excellent job of representing the organization in speeches to outside groups, including ones comprised of customers, suppliers and even competitors. The days of companies and other organizations being able to hide from the public are over. Organizations need representatives who can articulately describe their

mission, programs and projects to a variety of different groups.

Becoming an excellent speech-maker is definitely within your capability. As is the case with learning any other valuable skill, it helps to follow certain specific steps but you must invest the necessary effort to do so. Also, like anything else, the more you do it, the better you will become. The payoff is that doing so will accelerate your career and raise your profile above your peers within the organization.

Everyone experiences some fear about giving a speech. No one expects you to give anything like a perfect performance, especially when you are new at doing it. The surprise is that you will actually be much better at speaking than you remotely think you will be.

### **THE INVITATION**

Take advantage of any opportunity to participate in speaking before a group — introducing a speaker, joining in a presentation, or making a speech. Despite all your fears of doing so, you just have to do it.

The one exception is when you are asked to give a speech on a subject you really do not care about and

on which you have nothing worthwhile to say. When you are not informed, passionate and committed about what you are asked to speak about, politely decline the invitation.

If you are asked to speak on a panel or at a conference, ask the person giving the invitation if you can be the first speaker. It is always best to speak when the audience is fresh.

When you receive a speech invitation, also ask who is going to introduce you. If you are concerned about the person introducing you, you may be able to suggest someone else. Obtain that individual's contact information. Write your own brief introduction and send it to your introducer two weeks ahead of time with a covering note saying, "Thought the attached might be helpful in introducing me." Bring a copy to the speech event in case your introducer has misplaced it and asks you for another copy.

In addition, get as much information about your audience as you can from the individual inviting you to speak. Find out what you have in common with the members of the audience. Ask about their special interests, likes and dislikes. Determine the attire you should wear for your speech.

The final questions to cover when you receive a speech invitation are how long do you have to speak, where will you be speaking, how large is the audience likely to be, what facilities are available for using audio-visual aids, and will there be a question-and-answer period afterwards? Also, let the organizer know if you think you will need a microphone, especially when you have a quiet voice.

### **THE PURPOSE**

Speeches generally serve one of three primary purposes — to inform, persuade or entertain. To a large extent, this is a function of the audience and the event at which you are speaking.

You have to be guided more by what your audience wants and needs to hear as opposed to what you want to say. This will enable you to formulate the basic theme and purpose of your speech. Nothing is worse than being out of sync with your audience’s expectations. For example, you do not want to deliver a lengthy informative speech when your main purpose should be to entertain.

### **PREPARATION**

You are ready to start the speech’s preparation once you have determined its primary purpose and gained a good understanding of the character of the audience. The combination of these two factors establishes the overall framework for your speech.

Regardless of the speech’s principal purpose, you need to give your audience something of value that will cause everyone to remember you afterwards. To do so, you have to get your creative juices flowing as soon as possible by thinking day and night about possible ideas and points to include in your speech.

Start a speech file. Write down notes on interesting ideas, stories, comparable situations, pertinent facts, and themes you might want to use. Let your speech thinking go in wild and unpredictable directions. Pick the brains of your friends and associates. Ask them, “If you were me, what points would you make to this audience?” Keep notes on humorous jokes and stories in your speech file.

Put yourself in the audience’s shoes. Think through what subjects and issues are most relevant and important to your listeners. What do they want to hear?

What is really going to move them? What are likely to be their emotional hot buttons?

Develop an overall theme for your speech. Within this theme, decide on the two or three main points you should make. That is all any speech should attempt to cover. Begin by thinking of your theme and main points in loose, general terms. Keep your mind open to creative and different ways of dealing with your theme and main points.

Go to unconventional sources to research your speech. Use Internet search engines. Browse through any relevant Web sites. Build up your speech file as much as you can.

### **WRITING THE SPEECH**

Two weeks before your speech, you have to sit down and write it. As you do so, there are two principles to keep in mind — “the worst sin is to bore” and “less is more”.

An audience will forgive you for absolutely anything except for being boring. Less is more applies to everything from the length of your speech to the number of points you try to make or the number of facts and slides you use. When in doubt, leave out.

Plan your speech to take no more than 75% of the allotted time. If there is going to be a question-and-answer period, limit your speech to 50% of the available time. The shorter your speech, the better. As the famous vaudeville entertainer Al Jolson said, “Always leave them wanting more.”

The steps in actually writing a speech are:

1. Crystallize the central theme into a written single sentence, statement or newspaper headline.
2. Do the same for the supporting two or three main points.
3. Prepare an outline of the speech.
4. Write the speech word-for-word.
5. Decide on what audiovisual aids to use.
6. Edit and rework the speech into the format that best suits the way you want to deliver it.

In preparing the outline, divide the speech into logical progressive parts, similar to the different courses in a meal. Start with an intro or appetizer, then cover a manageable number of parts in the main body or course, and end with the conclusion or dessert. Try to

establish a linkage or natural progression as you go from part to part. Sequence what you have to say in order of importance.

With speeches whose principal purpose is to inform the audience, a simple outline to follow is tell them what you are going to tell them, tell them, and then tell them what you told them. For speeches designed to persuade the audience, a straightforward approach is to state the issue, give the facts and reasons for your recommendation, and issue a challenge or call for action to deal with the issue as your conclusion.

The reasons for writing your speech out word-for-word is to force yourself to think through exactly what you need to say and how best to say it in the most effective, concise manner. It is a necessary discipline you have to go through to get it right. While you are not going to read the speech to the audience word-for-word, it usually is also a good idea to have copies of it available to distribute afterwards if anyone, including the media, wants one.

Write your speech in a conversational style just as you normally would express yourself verbally in talking to a friend or associate. The best speeches are delivered as conversations between the speaker and

the audience. Keep that as your mindset in planning, writing and delivering your speech.

The opening statement of your speech is critical to getting the audience on your side and capturing their full attention. Addressing the audience as "Ladies and Gentlemen" is too weak. Pick an appropriate address that immediately establishes rapport between the audience and yourself, such as "Good morning fellow book lovers!" Similarly, do not open your speech by saying, "I'm happy to be here" or "Thank you for inviting me to speak to you." Also, do not explain why you are the speaker or apologize for anything.

Experienced speakers often start their speeches with a humorous story or joke that relates to the central theme of the speech. If you use this approach, do not risk saying anything that some members of the audience might find offensive. Also, do not begin by warning people ahead of time that you are going to tell them a joke or story. Just do it.

You have about 15 seconds to secure the attention of your audience or you will lose them. The opening line of your speech therefore is critical and serves as the launching pad for the remainder of your remarks. It has to be memorable, a grabber, something your listeners

can easily picture in their minds and relate to. It has to be brief, punchy and nothing abstract or complicated. Alternative openings include a dramatic statement, a startling statistic, a compelling news headline, a provocative question, a quote from a well-known source, or a pertinent definition from a dictionary.

To engage the audience at the beginning, some speakers start by asking the audience to answer several pertinent, topical questions through a show of hands. For example, "How many of you think that ... ?" This causes the audience to sit up and pay attention, plus gets you into a more relaxed informal mode.

In your introduction, you need to briefly give the background or provide the context of why what you are about to say is relevant for the audience. Then, tell your listeners what you are going to be covering in as few words as possible. Afterwards, you are ready to move into the main body of your speech.

Keep each part of your speech focused and to the point. Support your opinions, points and recommendations with concrete examples, facts and statistics. Avoid qualifiers. Use anecdotes, analogies and metaphors to illustrate your main points in a vivid, attention-getting manner. As is the case with most verbal communications,

by far the most powerful way to communicate is to tell a story that in effect takes your audience on a journey with you, such as a personal experience you had.

Try to create simple word-pictures in the minds of the audience around each of your main points. Get creative and off-the-wall in doing so. Refer to something from a well-known movie, TV show or book to buttress your statements. Use quotations from famous characters and historical figures, such as Winston Churchill, Will Rogers and Harry Truman.

Avoid long or complicated words and sentences. Employ the active verb tense to be more direct and forceful. Limit each sentence to one idea. Do not exaggerate or over-communicate. Eliminate unnecessary adjectives and adverbs like "very". Be careful about using generalizations.

Address the audience using the personal pronoun "you" as opposed to the more indirect third person "they". You want the audience to relate to what you are saying personally rather than thinking it applies to someone else.

Insert humor in your speech whenever there is a good opportunity to do so. Good-natured humor causes audiences to relax and connect with the speaker.

The more you can deliver your humorous comments or stories in a seemingly spontaneous or off-the-cuff manner, the better. Whatever you do, do not try to tell a joke by reading it from your written speech.

Avoid using euphemisms, jargon or overly technical terms. If you must use acronyms, define them for the audience in a clear manner. Whenever you are unsure about the correct meaning or pronunciation of a word, select an alternative word that is more easily said and understood. Use words that are common to daily conversations.

Refrain from talking about yourself other than to relate your own experience to the points you are making. Avoid being self-deprecating except in a humorous way. Refrain from playing the role of someone you are not. Do not sound officious or like you are lecturing to the audience.

End your speech in a forceful manner with a firm challenge or inspirational recommendation. Period. Not with a weak "Thank you for ..."

When you have finished writing the first draft of your speech, put it away for a day and clear your mind of any thoughts about it. Then, the next day, sit down

and start editing and reworking your speech to achieve greater brevity, clarity and punch.

After you have finished your editing work, type your speech on 8½" x 11" white pages in 18-point type, using double spaces between each line and four spaces between paragraphs. Leave the bottom one-third of each page blank so you do not have to look too far down when you are giving the speech. Type paragraphs so they always end on the same page as opposed to continuing on to the next page. Number your pages at the top and do not use all capital letters in your type. Boldface all the type or just the key phases and words in each paragraph.

A New York speech training firm, Communispond, recommends leaving three to four inches on the right-hand side of each type-written page blank to permit you to draw visual pictures or graphics beside each of your key paragraphs. If you do this, attempt to draw large, simple, cartoon-like pictures that capture the essence of the idea or paragraph. By having such pictures beside the text, you only have to glance at them to know what you want to say.

## AUDIOVISUAL AIDS

Incorporating some form of visual aid, prop or other physical element in the delivery of your speech often helps to generate interest and give emphasis to your point. It can be something held in your hand, shown on a screen, or dumped on the table. The more it is novel and unexpected, the better as long as it closely ties into what you are saying. Adding an audio element often doubles the impact when it's done well.

Such audiovisual aids range all the way from using a simple hand-held prop, such as a telephone book, to a much more involved audiovisual PowerPoint presentation requiring separate supporting projectionists and considerable production expenses. The more complicated the speech's audiovisual aids, however, the greater the risk for something going wrong.

For speeches whose purpose is to inform or persuade, the use of projected graphs such as slides or overhead transparencies of charts, tables and lists of bulleted points are excellent ways to facilitate the communication of your message, particularly if your subject is multi-faceted and you are speaking for longer than 10 to 12 minutes. Keep in mind the principle, less is more, in using such visual aids. The fewer the slides,

the better. Limit the information on each slide to illustrate one key point or idea. Try to use unexpected and original slides, including cartoons. Do not use slides to make obvious or simplistic points.

For maximum readability, utilize 32-point type on slides and limit the number of lines to no more than six per slide. To hold the attention of your audience, vary the format of your slides between bullets, charts and pictures. Ration your use of animation and other special effects.

The safest slide presentations are those which you can control with some type of "clicker". Make sure the size of the type or information on each slide can be read by the audience in the back of the room. Have the room darkened as necessary when the time comes to use the slides but never dim the lights so much that you are talking in the dark. You need to maintain physical and visual contact with the audience. If it is possible, ask for a small light to be clipped to the podium to keep you illuminated when the room is darkened for your slides.

Your first slide should be blank. As a general rule, spend no more than 30 to 40 seconds per slide. If you need to spend much longer on a slide, consider putting the information on two slides. When you are not

immediately going on to the next slide, switch on a blank slide so the audience is not distracted by the old slide. When you have finished with the last slide, turn off the projector or switch to another blank slide. The same applies to the use of overhead transparencies.

Millions of computer users have access to PowerPoint presentation software. Like other audiovisual aids, it is just a tool to help you communicate your points and information in a speech or presentation. The advantage of PowerPoint is its versatility in enabling you to include a range of different visual images in your talk, including photos, pictures and cartoons, which audiences find more interesting than viewing a slide of just words.

The previous cautions about using slides equally apply to PowerPoint. Do not overuse it. Many PowerPoint presentations are criticized for being glib, superficial and without substance. Two Web sites with PowerPoint tips are *www.powerpointers.com* and the PowerPoint section of Microsoft Office's site, *www.office.microsoft.com/en-us/powerpoint/default.aspx*.

At the beginning of using slides or overheads, advise your audience that you will have copies of them available after your speech if you think it is worthwhile to do so. Depending on the importance of the subject,

you may also want to have copies of your full speech available to distribute. Never give out copies of your slides or speech beforehand.

When something goes wrong with the audiovisual equipment you are using, keep your cool, spend no more than four minutes trying to fix it, and move on with the rest of your speech or presentation. Be good-humored about it and never make disparaging remarks about the equipment or those who set it up.

### **BEFORE THE SPEECH**

Take the final copy of your speech and underline in red the key phrases and words. Read the speech to yourself and try to establish a cadence or natural pacing to the delivery of your words, phrases and ideas. Insert red slash marks in accordance with this pacing. After the end of most slash marks, you ideally should be able to pause and look at the audience.

Rehearse delivering your speech aloud on your feet, duplicating as much as possible the actual physical circumstances where you will be speaking, apart from the audience. Pay special attention to when you should pause and look at the audience. Time yourself in case your speech is too long.

Practise speaking slowly enough and loudly enough. Vary your voice tone for emphasis. Rehearse presenting your speech, not reading it. Do not be concerned if you say the words somewhat differently each time. Your objective is to communicate ideas and messages, not words. Use your hand-drawn images on the right-hand side of each page to help guide you. Do a dry run of your speech using the audiovisual aids and equipment.

Do not staple the pages of your speech together. Use a paper clip instead and remove the paper clip when you step to the podium. When you finish with each page in presenting your speech, just slide it to the left of the remaining pages of your speech.

The end goal of rehearsing is to make yourself so familiar with what you want to say that you do not have to read your entire speech word-for-word. At a minimum, you need to be able to deliver your opening and closing remarks looking directly at the audience without having to glance down at your notes.

Visit the room where you are speaking one or two days beforehand and, if possible, familiarize yourself with the podium. Verify that it is the right height for you and ask to use a different podium if it is not. Check out how the microphone works.

Double check that the necessary arrangements have been made for any required audiovisual equipment. When you are using rented equipment, make sure it arrives at least four hours beforehand. Verify that it works properly. If the lighting has to be dimmed, determine how that is going to be controlled. For speeches longer than ten minutes, arrange to have a glass of water available for you at the podium.

While you need to test all needed equipment beforehand, it is always a good idea to have a backup plan in hand in case something goes wrong with the audiovisual equipment you are using. Since it often does, do not let yourself be surprised when it happens.

Determine beforehand how the audience is going to be dressed. Your mode of dress as the speaker should be in sync with the highest common denominator of dress in the audience. Error slightly on being overdressed for your audience as opposed to being too casual.

Keep your dress and appearance simple. Do not wear anything with vivid and distracting colors or patterns. Avoid clothes of an extreme fashion or style. Solid-color dresses, jackets and suits are best. The same goes for blouses and shirts.

Bring extra copies of your speech and any handouts you wish to distribute to the audience afterwards with you. Again, bring an extra copy of your own scripted introduction, in case the person introducing you has lost his notes for doing so.

Eat lightly, if at all, before you speak. Try to make sure nothing gets caught in your teeth. Also, do not drink a lot of liquids before you speak. Never have anything alcoholic to drink beforehand. It will not help you to relax.

You just have to accept the fact that all speakers are nervous and fearful of getting up to speak in front of an audience. That is the way it goes for everyone, regardless of how many speeches anyone has previously given. While you are waiting to speak, concentrate on reading the pulse of the audience. Try to gauge its mood and temperament. Get a sense of what is the right tone for you to use with the audience.

Just before going up to the podium, visualize yourself at your absolute personal best. Take a couple of deep breaths by inhaling slowly through your nose and exhaling through your mouth. Then, stand up and walk purposefully and confidently to the podium with your shoulders back, saying to yourself, "I'm just going to have a conversation with these people."

## **GIVING THE SPEECH**

Do not rush into your speech. Pause before speaking and look over the audience. Get yourself centered on the audience before you begin. The impression you make in the first 30 seconds is critical to capturing your audience.

You have to communicate with your total being. The reality is, how you say it is much more important than the words you actually say. The impact of your speech is going to be heavily influenced first by your body language and second by the tone and loudness of your voice.

More than anything else, you have to let yourself be yourself. As the wildly successful media executive Roger Ailes said, "You are the message." That means it is not just your words but also many other factors, including your eyes, facial expressions, body movements, emotional intensity, the pitch of your voice, and your sense of humor.

While you want to speak to the audience as if you are having a private conversation with its members, you do need to boost your energy level and increase the loudness of your voice. At the same time, you have to slow down your pace of speaking so the audience can better hear you.

Face the audience squarely with your feet about six inches or so apart with your arms at your sides and one or both of your hands resting on, not clutching, the podium. Stand up straight with your knees slightly flexed and tilt yourself a bit forward. Adjust the mike up and down if necessary so that it is approximately six inches below the level of your chin. Keep your posture open with your head and chin up. Do not put your hands in your pockets.

Deliver your speech with enthusiasm, passion and sincerity. Show that you are truly committed and care about your subject and the audience. Pump up your physical energy and free your body to react naturally to what you are saying. Let yourself move and gesture freely as you would in any normal conversation. Do not tighten up and become inhibited physically. After you start, try to relax a bit. Free up your hands to help you make your points.

Think of your audience as a collection of individuals whom you are talking to, one at a time. Look first at a person in the center of the audience and then at other individuals on either side of the room as you continue speaking. Try to vary your looking down at the text so that you are looking up at the end of each sentence. Look at one individual in the audience, com-

plete saying your idea or thought, and then move on to the next person.

By exercising such eye control, looking at each person for about five seconds as you are speaking, you will slow down your thought process and retain better control of yourself and your pace. If you let your eyes jump around, your thoughts will too. The more visual control you maintain on a one-to-one basis talking person-to-person, the more you will be able to think calmly.

Speak in your own voice but make it louder than you normally speak. Do not speak too quickly. Put some warmth and emotion into your voice. Use pauses for emphasis. Vary the volume of your voice so you are not speaking in a boring monotone. Eliminate the use of any non-words, such as "er", "uh", "ah", and "um". Resist using meaningless phrases such as "I'd like to ..." and "you see ..." Do not start sentences with "Well, ..." Avoid rambling.

Refrain from hiding behind the podium as you talk. Let yourself be a "natural animal" and move around a bit. Avoid clasping your hands together, including in front of you or behind your back. Do not hold a pen, pencil or pointer in your hand as you talk. It will distract the audience's attention.

The best microphone is a wireless or mobile one clipped on to your shirt, collar or jacket lapel. This will enable you to get closer to the audience by stepping in front of or to one side of the podium, providing you do not need to refer to your notes as you are speaking. When you do so, take at least two or three steps, stay for a while in the same spot as you are speaking, and then return to the podium. Some speakers roam around the stage as they are speaking but this can be disconcerting for the audience.

If an accident happens or something goes wrong, smile, show some pluck and motor on, even if it involved you falling flat on your face. Make some humorous comment about it. Whatever you do, never get angry or uptight as a result. Everyone knows you are human and mistakes happen.

### **QUESTION AND ANSWERS**

When you know ahead of time that a question-and-answer period is going to follow your speech, forearm yourself by identifying what are the five toughest or most embarrassing questions you could be asked. Prepare your answers and anticipate any possible follow-up questions.

The best way to get such a session started is to plant several questions beforehand with friendly members of the audience. Then, call on these people first for their "questions". When no questions are immediately forthcoming from the audience, get things rolling by saying: "The two questions I'm most frequently asked on this subject are ... " And answer them.

Gesture with an open hand or your palm, not a pointed finger, to the person in the audience you want to take a question from. After the individual asks the question, look away to the center of the audience and repeat the question loudly so everyone can hear it. If you do not like the question, rephrase it in a more favorable way when you repeat it to the audience. Then, look back at the person to answer the question, after which return your attention to the center of the audience for the next question.

Pause to think about your answer, if you have to do so, before giving it. Avoid saying to a questioner, "That is a good question," as this implies the others were not. If you do not really know the answer to a question, you are much better off to say so than to fudge the answer. Never lie or try to cover up something. Admit it when you have made a mistake.

If someone asks you a hypothetical question, always answer: “I prefer not to give hypothetical answers.” Hypothetical questions are almost always dangerous to answer.

With hostile questions, you have the option of not giving a direct answer. Politicians are especially skillful at answering such questions with an answer that actually addresses another more favorable subject. You can always use a question as a bridge to another point you want to make. Look away from a hostile questioner as soon as you can. Move on to the next question right away so you do not get locked into a counterproductive argument. Nevertheless, treat all questioners with courtesy and respect.

Avoid saying after your answer, “Does that answer your question?” Otherwise, you will be engaging in a conversation with that person and lose your audience. Have a line prepared for you to end the question-and-answer period on a positive note when your time is up.

If you are wearing a wireless mike, always remember to turn it off when you are finished. You do not want the audience to overhear any private remarks made afterwards, either by someone else to you or by yourself. It could be embarrassing.

## **PRESENTATIONS**

Most of the prior recommendations regarding speeches also apply to presentations, which usually involve persuading the attendees to agree to take some action for yourself or your organization. Presentations are often made to smaller groups without a podium or microphone. Often there is a team of two to four people making a presentation jointly with one of them serving as the lead presenter.

With presentations, it is especially important to be well-informed about the other side and its attendees. In particular, you need to understand how the other side makes decisions, who is its primary decision-maker, and who is usually most influential with that person.

Research as much as you can about the other organization and the participants attending your presentation. The more you customize your presentation to your specific audience as opposed to giving a canned standard talk, the more impact your presentation will have.

Like speeches, the most critical principles to keep in mind are — less is more, do not bore, and refrain from over-communicating. The shorter you make your presentation, the more time you will have for questions and answers. Concentrate on making no more than

three main points. Keep the formal part of your team's presentation to a maximum of 12 to 15 minutes.

Although presentations are generally less formal and more interactive than speeches, you need to script your presentation at least in outline form. A common approach is to cover:

1. The introduction and presentation agenda.
2. The definition of the central issue, problem or opportunity.
3. The most relevant factors pertaining to #2.
4. The recommendation.
5. The benefits of accepting the recommendation.
6. The steps required to implement the recommendation.
7. Questions.
8. The conclusion.
9. Distribution of supporting materials.

In preparing for your presentation, the first requirement after researching the other side is to make certain you have clearly and correctly defined the central issue, problem or opportunity from the standpoint of the attendees and their organization. Second, you need to

determine what the other side must believe in order to accept your recommendation. Put yourself in their shoes. Are the benefits to the other side truly compelling and to what extent can you substantiate them? Third, you must anticipate the other side's most likely objections and questions, and formulate your response to them.

Just as is the case with a speech, your opening line must command the attention of the attendees in a compelling, dynamic manner. It has to make them sit up straight and keenly want to hear what you have to say. Its content has to make an immediate connection between your listeners and yourself.

In your following introduction, briefly give the reason you are there to make the presentation and why it is relevant to the attendees, describe what you intend to cover, state how long your presentation is going to take (using a conservative estimate so you always end sooner), propose that you will take questions following your presentation, and let everyone know if you intend to distribute handout materials afterwards. Throughout the presentation, keep your comments focused, purposeful, and as brief as possible. Following the question period, conclude your presentation with a short, strong, hopefully memorable finish.

Decide on the appropriate audiovisual aids necessary to capture the attention of the attendees and support the points you want to make. Be original in your use of such aids. Do not show boring visuals, such as graphs and charts, when you can include them in your handout materials. When you show a slide, the best approach is to pause to let the audience read it and then to make a capsule comment on why the content of the slide is relevant to the point you are making. Use a pointer with your visuals if it helps to do so but keep your attention on the listeners, not the slides.

Rehearse your presentation in front of your team members and other knowledgeable associates. Ask them to be critical and objective in making suggestions for improvement. Rehearse again after making changes.

Arrive sufficiently in advance of the start of the presentation to give yourself ample time to set up and test any audiovisual equipment you are using. Dress in sync with your audience. When the other side arrives, introduce your team members and yourself to each of the attendees and exchange business cards if it is appropriate to do so. Resist handing out any supporting materials until after you have made your presentation.

If you are making the presentation sitting down, sit up straight facing the center of your audience with both your feet on the floor in front of you and your hands on the table. Like a speech, think of yourself as engaging in a conversation with each of the attendees. Refer to your written notes and presentation outline as necessary but talk to the attendees, do not read to them.

Start your presentation by looking at the key decision-maker first and then gradually establish eye contact with the individuals on one side of the table or room and then the other. When you are making your most important points, recommendation and concluding remarks, return your eye contact to the key decision-maker as you begin to do so.

Use the name of the other side's organization throughout your presentation. Inject humor into your presentation when it ties into what you are saying. Do not play the role of someone else or take yourself too seriously. If you are running out of time, do not talk faster. Eliminate some of what you were going to say. After the formal part of the presentation, distribute any supporting handout materials to the attendees.

In the question period, if you are unable to answer a question, say so and promise to get back to that

person with the answer within a specified number of days. Do not fudge or hedge your answers to tough questions or you will undermine everything you said in your presentation. Be honest and straightforward in your answers. Always follow through afterwards and provide any requested answers or information within the time period you promised to do so.

Following your concluding remarks, ask for clarification if there is any ambiguity concerning the next steps both sides are to take. If you sense it is appropriate to do so, ask the other side when you might expect a decision to be reached on your recommendation. Sometimes, this question is better asked on a one-on-one basis with the key decision-maker afterwards to avoid being perceived as "pushy".

### **INTERNATIONAL SPEECHES AND PRESENTATIONS**

Exercise sensitivity in giving a speech or presentation to an audience whose language, culture and customs are different from yours. In this case, the principle of knowing your audience is especially important in order to have any chance of successfully communicating your message.

Devote the necessary effort to understanding the cultural background of the audience and its social and business customs. Research the current economic and political issues facing the audience's country and region. Talk to individuals who have experience in dealing with members of the audience. Determine the audience's principal values and hot buttons.

Pay careful attention to following the proper protocol expected by your audience, especially in your opening and closing comments. Start by acknowledging any senior executives and officials present in the audience in a respectful manner.

Be cautious in using humor. Avoid any form of sarcasm. Do not use jargon, technical terms or complicated language. It is too easy for your audience to misunderstand what you are saying.

If you are using an interpreter, address the audience in terms of eye contact, not the interpreter. Pace your speech so that you pause after each main paragraph or idea to give the interpreter time to translate your comments for the audience. Just be yourself and do not talk down to the audience.

When your speech is being translated simultaneously for the audience through an audio-hearing

system, you need to speak more slowly than you normally do. In this case, you do not have to have the same length of pauses as is necessary with an interpreter. With both an interpreter and the person doing the simultaneous translation, it is extremely helpful to provide them with a copy of your speech beforehand, ideally translated into their language. It is also a good idea to have copies of your speech available to give out afterwards to the audience.

After you return home from such a speech, write a thank-you letter to the person responsible for inviting you to speak, expressing appreciation for both the opportunity to speak and any related arrangements made by that individual on your behalf.

### **FEEDBACK**

Following every speech and presentation you make, attempt to get some objective feedback from an associate who was there. It is similar to analyzing a video replay of a sports event. You need to know what were the strongest and weakest parts of your performance to enable you to increase the effectiveness of your next speech or presentation. Make notes on what you should do differently the next time for your speech file.

After reading this chapter you must be asking yourself, “Why would I ever put myself through something that requires such a major effort?” The answer is simple. One of the fastest ways to advance in any organization is to become one of its spokespeople, to be the person your manager turns to when someone is needed to make a speech or presentation on behalf of the organization or at a special event. To become a leader today, you have to become an effective communicator — both one-on-one and in front of groups to promote the interests of your organization.

To speed up the process of becoming an excellent speaker, consider enrolling in Toastmasters International’s program if one is available locally. This is a worldwide non-profit organization that offers hour-long weekly group meetings devoted to improving one’s skills in public speaking, conducting meetings and leadership. Its Web site is *www.toastmasters.org*.

## CHAPTER 10

# DEALING WITH THE MEDIA

**If you develop a reputation as being a good spokesperson for your organization, at some point in time you will likely end up having to deal with the media.**

There are different forms of media ranging from relatively tame print trade publications (restricted to covering a particular field or industry) at one end of the spectrum through to the more independent mass media of newspapers, radio and television at the other end.

In the case of all media, there are generally three different types of “stories” for them to cover. The first

is the information story, primarily covered by print publications, where the reporter believes readers will have an interest in learning more about your organization and its plans, products and services. This is typically the case with trade publications whose readers already have an affinity for the field the publications cover.

The second type of story is the general interest or community story covered by the various forms of mass media whose readers and viewers are likely to be attracted to the story as it touches on their lives, daily concerns and passions in some way. Handled properly, such stories can build goodwill and understanding for your organization on the part of the public.

The third type of story is media coverage given to "hard news" of some event or development that is likely to capture the attention of the general public. Such hard news concerns a crisis or other major newsworthy occurrence that the mass media is going to cover, regardless of whether anyone in your organization chooses to say anything about the story. As the mass media usually assigns its most experienced reporters to this type of story, you have to be extremely skillful in conveying your organization's side of the story.

When your organization is the subject of the third type of story, press releases will have minimum impact with the media. The assigned reporters will want to get their information directly from a variety of personal sources. In particular, they will want to talk to the most senior person they can access within your organization unless someone has been designated as its media spokesperson. The rest of this chapter assumes you are the designated spokesperson for your organization.

### **DIFFERENT GOALS / DIFFERENT PLANETS**

The starting point in dealing with the media is always to keep in mind that the media and your organization have entirely different goals. The media's goal is to maximize its number of readers, listeners and viewers. To accomplish this goal, the media has to report on stories in such a way that captures the attention of readers and viewers. Your goal is to have your organization perceived by the public in the most favorable or least damaging way possible.

Reporters get paid to produce news and stories that sell newspapers and boost radio and television ratings. Think of reporters as coming from an entirely different planet than yourself. Reporters have a process to

go through and you are simply part of that process. They are neither your enemy nor a friend.

Approach any contact with the media with a certain amount of caution. Reporters are extremely experienced in employing a variety of techniques, including flattery, to get you to relax, let down your guard and say something newsworthy that you will later regret having said. Seducing you into doing so is part of their process. Also, do not assume female reporters will be less aggressive than males in pursuing a story.

It is definitely counterproductive to treat reporters with hostility or in a highly defensive manner. Understand how the media operates and how you can help reporters meet their needs without damaging your organization. Some reporters will appear to be aggressive and pushy when they are just acting under pressure to meet a deadline.

Never get into a fight with the media. As the saying goes, you cannot beat people who buy their ink by the barrel. These are battles you simply will never win. Your chances of beating the media by manipulating the reporters and distorting the facts are about zero.

In the final analysis, the various forms of media own their news stories. They have total control over

how they choose to report a story. Yes, they want to tell the truth but they will do so in a way that serves their own goals.

If you are going to become actively involved on an ongoing basis as a spokesperson for your organization, it usually pays to identify those reporters for the various media whose work especially impresses you as it relates to covering your field or industry. Take advantage of opportunities to help those reporters become better informed on subjects where you have a special expertise or knowledge before your organization becomes the subject of a story. Become a source of reliable information for them. By developing such a relationship with reporters beforehand, you will have greater credibility with them when you need it. Just remember, however, they are still from a different planet.

### **INITIAL CONTACT**

Resist doing an interview or making comments to the media on the spot in an impromptu manner. Say you will call back at a certain time. Before you do so, think through what the reporter is really after and research the reporter's background.

Always, repeat always, decline to comment or answer questions from the media relating to a so-called rumor or speculation. Just firmly state, "It is my policy never to comment on rumors or speculation of any type." And then keep your mouth shut.

When you are contacted for an interview on a serious subject, before you agree you need to develop an awareness of the reporter's style and approach to covering a story. Read the reporter's previous articles or watch videos of the reporter's prior television interviews and programs. Whenever possible, talk to other people who have been interviewed by the same reporter. The more you understand the reporter's biases and point of view, the better equipped you will be to make the right decision about your response to that reporter.

There will always be occasions when you should say "no" to a request for an interview from the media. Sometimes, you may not be the best person to speak on the issue at hand. In this case, attempt to steer the reporter to someone else in your organization or industry who can do a better job in terms of possessing the required knowledge on that issue.

Some radio and TV programs are known for taking a deliberately confrontational and even hostile approach

to their interviews. Requests to appear on such programs should invariably be declined. Even if you are extremely articulate and skillful in your responses, the producers will likely edit your comments in a way that is harmful to yourself and your organization.

Prior to committing to give an interview, you usually have an opportunity to obtain the interviewer's consent to certain conditions, such as no personal questions about your private life. With the print media, you can ask to verify the accuracy of your quotes and the facts used before the article is run. There are no guarantees, however, that such agreements will be observed.

When you are asked to participate in a radio or TV program, ask what is going to be the broad outline of the program and what subjects are likely going to be covered. Also, ask who else is going to be on the show and what positions are they likely to take. In addition, if you have an opportunity to talk to the interviewers beforehand, it is acceptable to ask them to give you an idea of the type of questions they are planning on asking.

If you are responsible for scheduling a press conference, select a time and place that suits as many of the different media as is possible. Each type of media has its own deadlines and special needs.

Avoid letting yourself get pushed into saying something as a result of a reporter having a deadline to meet. That is the reporter's problem, not yours. Trust your instincts. If your gut says do not respond, keep quiet.

### **PREPARATION**

Avoid going into any interview situation with the media without doing the necessary preparation beforehand. First, put yourself in the reporter's shoes. Ask yourself what exactly is the reporter trying to do with this interview, what angles is the reporter likely to pursue, what are the issues that the reporter is probably going to want to concentrate on?

Second, try to identify the most critical, embarrassing or toughest questions the reporter may ask. Develop answers to those questions that put your organization in the best possible light. Get the necessary information to help you do so.

Third, determine what you can do to help meet the needs of the reporter for the interview or story. Is there any background material, including facts and statistics, that you should give the reporter either in advance of the interview or when it takes place? Should the reporter

be offered a tour of your facilities or the opportunity to meet other people in your organization?

Last, decide what you require to achieve a successful interview. Distill this into the two or three most important positive messages you need to convey to the reporter's audience. Develop some alternative ways of expressing these messages in an articulate manner.

Ask your associates to help you with this preparation. Brainstorm the likely questions and how you should best answer them. If the interview concerns an issue with serious consequences, verify beforehand the extent of your authority to speak on behalf of your organization.

### **DURING THE INTERVIEW**

Follow these ground rules during print, radio and television interviews:

- ★ Use the reporter's first name when you are answering questions and conversing with him or her.
- ★ Be yourself. Do not adopt a condescending or patronizing tone of voice. Express yourself simply and with conviction. Let yourself be enthusiastic and even passionate about what

you believe in. Do not be afraid to show some emotions. You are supposed to be human.

- ★ **Keep your answers concise, positive and sincere.** Avoid rambling and the use of technical jargon. The more adversarial the question, the shorter your answer needs to be despite your natural inclination to give a long answer. The more you say, the easier it will be for the interviewer to turn your words against you. Say what you need to and then shut up. Do not be afraid of silences.
- ★ **Take advantage of opportunities to get across your two or three most important messages.** If an issue or question is raised that touches on one of your key messages, say something to the effect that: "When it comes to ... , I think everyone needs to remember that ... " Try to do so as early in the interview as you can.
- ★ **Help the reporter focus on the most important issues in the story.** Inject key statistics, new human interest elements, colorful anecdotes and unusual facts into your answers and comments. On the other hand, resist getting side-tracked and giving the reporter more information than is needed.

- ★ **If you are caught off guard with a hostile question, do not give a rushed answer.** Instead, pause to give yourself time to think. Unless it is being carried live, any such pauses will be edited out in radio or television shows. You are also not obligated to give a direct answer to every question. As politicians often do, you can respond with a non-answer by essentially giving an answer to a different but more favorably related question.
- ★ **When an interviewer makes an inaccurate statement that reflects negatively on you or your organization, do not hesitate to interrupt and politely but firmly correct the inaccuracy.**
- ★ **Do not let the interviewer put words in your mouth that are negative.** Interject by saying, "Don, that's not what I said. I stated that ... "
- ★ **When you or your organization has made a mistake, you are always much better off to honestly admit it, accept responsibility for it, and apologize.** Where appropriate, you should also describe what is being done to correct the situation. The sooner you do all this in an interview, the better. Avoid stalling, hedging or making excuses.

## STAYING OUT OF TROUBLE

Here are some recommendations to help you stay out of trouble in interviews:

- ★ Do not lie, exaggerate or make claims that you are unable to substantiate. Even so-called "white lies" will likely cause problems.
- ★ Never make any "off-the-record" comments, regardless of what the reporter says. It is much safer to assume that everything you say will sooner or later end up on the record. "Just between us" is usually a meaningless phrase to reporters.
- ★ Refrain from commenting on the problems of other organizations, competitors and people, especially in a gossipy or speculative manner. Just say, "I'm not really in a good position to answer that."
- ★ Avoid answering hypothetical questions (e.g., "What would you do if this were to happen?"). They are almost always loaded and end up leading you into territory where you do not want to go.
- ★ Resist answering any question by first using the words "Yes" or "No". Being so categorical about anything can be dangerous.

- ★ If you are unable to answer a question, say so and briefly explain why if you can. Never say "No comment" as this tends to sound as if you are guilty or trying to cover up something. Giving a brief non-answer is better than saying "No comment."
- ★ When you are under attack in an interview, never respond to a hostile question by letting yourself get angry and hostile in return. Grit your teeth, keep your cool and remain courteous regardless of the provocation. This will earn you points with the audience. If appropriate, calmly say, "That is totally unjustified [or inaccurate]."

## TELEVISION

Television represents the most challenging form of media as it projects your total image to the audience, not just the words you say. As is the case with giving a speech, the combination of your body language, tone of voice, facial expressions, posture, and mode of dress is usually more important to conveying a positive image than the actual words you speak. If anything, the TV camera magnifies all of your nonverbal "expressions".

When you are going on television, keep your mode of dress simple and on the conservative side. Wear solid-colored suits, jackets and dresses, preferably in navy blue, grey or darker colors but not black. Two-tone outfits like blazers with slacks or skirts with sweaters are fine providing the color contrast is not extreme. Avoid checks, plaids and other complex patterned materials. Wear shirts and blouses in solid pale light colors, like light blue or cream colored, which are preferable to the color white on television. Keep your tie, scarf and other accessories subtle and unostentatious in design, color and pattern. Males should wear calf-length socks so no bare skin shows below their pants. The objective in selecting your wardrobe is to avoid wearing anything clashing or jarring that distracts the viewing audience's attention.

Prior to a TV interview, sit quietly by yourself or go for a walk. Review in your mind your main objectives for the interview, what you want to accomplish, and what are the interviewer's principal goals. Remind yourself of the need to make the interview a conversation between yourself and the interviewer.

Eat lightly or nothing beforehand. Take advantage of any offer to have makeup professionals do their job

on you. Immediately before starting the interview, drink some water to moisten and clear your throat.

Do not worry about looking at the TV cameras. Ignore them. Get yourself into the frame of mind that you are having a conversation with the interviewer in your living room at home. Talk to the interviewer, not the cameras. Let yourself move naturally. Try to avoid fidgeting or making any brusque or exaggerated movements.

Give yourself permission to be yourself. Try to assume an attentive but relaxed posture. Remember that you may be on camera even when you are not speaking. If you start to get nervous, just say to yourself that no one is really going to be watching the show anyway.

Keep your answers and comments short and to the point. Do not ramble on or beat about the bush. Unless the interview is being shown live, most of your responses will be edited down to about 12 to 20 seconds. This also applies to radio interviews. Remember to look at the interviewer as you answer questions, just as you would do when having a normal conversation with anyone.

Avoid nodding your head while the interviewer is talking or you will look like you are agreeing with

everything being said. If you do not understand a question or need time to think, ask the interviewer to repeat the question.

One final caution about TV — when you find yourself in a situation where you are unexpectedly ambushed by television cameras and reporters somewhere, do not run away from them. If you do, they will likely show this to illustrate you are guilty of something. You are much better to stop, face the reporters, and say, “At this time, I’m not in a position to say anything about ... ” Then, walk away.

In all your dealings with the media, you have to have realistic expectations. First, it is a mismatch of qualifications. Media reporters and interviewers are paid professionals who specialize in their craft of maximizing readers and viewers. You are not. Second, you and the media have totally different goals and responsibilities. Given all of the normal constraints, there will rarely be a situation where the media gets 100% of the story right, especially from your perspective. Over time, you will “win” some stories and interviews, and lose some. That is life. Do not take it personally.

To become more savvy about dealing with the media and being an effective spokesperson for your organization, I strongly recommend Roger Ailes’s book *You Are the Message: Getting What You Want By Being Who You Are*.

# CONCLUSION

It is impossible to exaggerate the importance of being a “pro” communicator in every facet of your daily life and career, regardless of who you are or what you do. The recommendations contained in the *Citizen of the World Guide, Be a “Pro” Communicator*, are highly relevant to those in the *Citizen of the World Guides, Make the Right Impression* and *Find the Right Job & Excel*. The fourth *Citizen of the World Guide, What’s Really Important*, provides recommendations for having a wonderful life.

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Next, I asked a number of individuals with a special expertise or sound understanding of the different subjects to provide me with a critique of the chapters or sections they knew the most about. For example, I asked the three best negotiators I've ever known to critique the chapter on negotiations. After receiving extensive feedback from a number of knowledgeable sources, I prepared the draft of the book.

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# ABOUT THE AUTHOR

Steele Curry has more than 40 years of business experience, including being the CEO of a successful publicly traded retail organization, starting a tool rental business with The Home Depot, owning a restaurant (always a humbling occupation), and serving on the board of directors of a number of corporations and charities. He was the board chair of the Alberta Mentor Foundation for Youth (2003–2008) and is now a member of the board of directors of Big Brothers Big Sisters of Calgary and Area. Over the past nine years, Steele has served as a mentor to seven high school students under a program now known as “mPower Youth Mentoring”.

Steele received a B.A. from Stanford University and a M.B.A. from Harvard University. He has lived in Canada, France and the U.S. and traveled extensively to

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Born in Winnipeg, Canada, Steele is married to Judy Kaganov who has a Ph.D in psychology. They have three children and live in Calgary, Canada. Every summer, the Currys spend two to three months on a Greek island in the Aegean Sea.

Steele is extremely interested in receiving your ideas and thoughts about the *Citizen of the World Guides*. Contact Steele through the Web site at [www.COTWguides.com](http://www.COTWguides.com).