

## 1. ANALYSIS

### Exercise

1. Put yourself in the writers' shoes. What problems do they hope to solve by writing their letters? What is in the situation that gives them the need to write?
2. State the objectives for each letter in priority order.
3. Do these priorities affect the tone of each letter? How would you characterize the different tones in each? How does this tone shape the relationship between writer and reader?

### Message 1

Dear Mr. Goodwin:

Our sincere apologies. I am enclosing a credit of \$108.00--a refund for the amount charged you on August 8.

We regret the charge, especially since you have always been one of our most reliable clients. In your letter of August 15, you mentioned that you had instructed the United Oregon Bank of Portland to transfer \$45,000 to your account here on August 1. Unfortunately they did not make the

transfer until August 10--which explains why on August 8 we were forced to make the overdraft charge of \$108.00 against your account.

I am enclosing copies of the August 10 teletype from United Oregon and our subsequent credit to your account. Maybe you should get in touch with them.

Meanwhile, however, I hope the enclosed refund will close this particular incident satisfactorily. We'll do our best to continue to serve you promptly--but also with fairness and understanding.

## Message 2

Dear Mr. Goodwin:

We are writing you in regard to overdraft charges of \$108.00 charged against your account on August 8. Enclosed you will find a credit for this amount.

In your letter of August 15, you stated that the United Oregon Bank of Portland was instructed to transfer \$45,000 on August 1 for credit to your account with our bank. We accept your good intentions and are crediting your account accordingly. However, this transfer was not made by the Oregon Bank until August 10. We are enclosing copies of the teletype record as well as of our credit to your account. The Oregon Bank did not transfer the funds on the date requested; and as a result, overdraft charges were incurred against your account.

May we suggest that you contact the Oregon Bank with reference to this matter so that any future transfers will be received by our bank on the date specified by your company?

Because you are one of our valued clients, however, we are refunding the \$108.00 overdraft charge--and we trust the situation will not recur in the future.

Sincerely,

## 1. Define the Problem

What's in the situation that gives rise to the need to write?

See what's there. What often prevents us from seeing clearly?

## 2. Define the Goal

Clarify where you want to go. What are your desired outcomes? What is their order of priority?

- Immediate Thinking, Feeling, Action Objectives

As a result of reading this message my audience will  
think \_\_\_\_\_, feel \_\_\_\_\_, do \_\_\_\_\_?

- Reactive/Proactive

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## Exercise

These two writers are responding to a message from the CEO: "Sales are down 25% in the central region. Explain to me what's going on. My guess is that Linda Cassavetes, whom you just made manager there, can't handle the job."

## Message 1

To: CEO  
FROM: Joe Kerswild  
SUBJECT: Low sales in the Central Region

I'm writing to you in response to your request that I come up with some kind of an explanation of why the central region is doing so poorly sales-wise.

This has nothing to do with her being a woman. Women are believed by most thinking people nowadays to have the same career capabilities as men and should be so treated.

It would seem however that Linda does not have the capability to deal with the pressure cooker type situation that she has found herself in. This is unfortunate because it was unforeseen.

It was not known that the central region's economy would go into a tailspin this year. And it was not known that Imperial Auto Parts would develop a ruthless price war in the region that has virtually killed any distributor's desire to buy our products.

I will be removing Linda from her position as regional manager and replacing her with Corey Ander, our western regional sales manager who I hope will be able to get things under control. His region has done pretty well in the past.

Sorry about this, but it's really due to circumstances out of our control. I only found out about these problems when you did because Miss Cassavetes didn't do a very good job of keeping me up to date with what was happening out there.

## Message 2

To: CEO  
FROM: Bill Iklub  
SUBJECT: Low Sales in Central Region

I am writing in response to your concern about the low sales in the Central Region. There are two primary causes which I hope to clarify in this memo: the central region's sluggish economy and Imperial Auto Parts' recent initiation of a price war in the Central Region.

**Sluggish Economy.**

Significant auto industry layoffs in the region have had a ripple effect in other key industries such as steel and coal production. This in turn has had a depressing effect on the purchasing power of consumers who are reluctant to buy anything but necessities until consumer confidence is restored.

Sales are down 30% to 35% in western Pennsylvania, Michigan, and Ohio where these layoffs have had the most adverse impact. Sales by the retail stores that carry our products and the products of our competitors have been down 25%-30% in the area, and, they report, would be down more if it were not for the price-war bargains created by Imperial Auto Parts.

**Price Slashing by Imperial.**

Imperial Auto Parts began to offer their products at prices below cost three months ago. This was in part a calculated strategy to dump its products on this market in an effort to increase its market share in the region.

I think Imperial has miscalculated. While some of the smaller competitors have chosen to match Imperial's prices, we have not. Linda Cassavetes, the regional manager I appointed five months ago, has argued, and I agree, that it would be a mistake to follow its lead. Our products are the highest quality on the market and most people know it, and despite the bargains on the market now our products continue to sell. I would attribute at most a temporary 5% loss of sales to the competition as a result of Imperial's and our other competitors' lowered prices.

Our competitors, however, cannot sustain these low prices for long. Indeed there are already some signs that their prices are coming back to normal levels in their ads in the Pittsburgh area. Linda recently pointed out in a rather detailed analysis that had we reduced our prices to match our competitors we would have increased our sales by 5%, but our revenues would have decreased by 15%.

She argues that Imperial's losses during this period do not justify the insignificant and temporary gain in market share it obtained. And she shows that Imperial has created cash-flow problems for itself that will significantly diminish its ability to promote and market its products in the next quarter. She argues that we have an excellent opportunity to take advantage of its weakness by intensifying our marketing efforts in the coming months. I am now working with her to develop a strategy along those lines. I have attached Linda's report for your review.

### **Closing Remarks**

This quarter's sales in the Central Region have been a disappointment, especially when compared with the steady performance in our other regions. The most important factor causing these negative results has come from the sluggish economy in this region. This difficult situation has been aggravated slightly by the recent price war, a war that we did not participate in and which has left us as result stronger than our competitors at least for the near term.

I know there was some concern about Linda's inexperience and the resistance of some of the men to having a woman for a boss. I was concerned, too, and worked closely with her throughout this difficult period. I hired her for this job because of her aggressiveness, her analytical abilities, and her remarkable communication skills. These skills have been severely tested over the last couple of months, and she has used them all in ways that exceeded my expectations. The most recent reports I've been getting from the men in the field would back me up on this.

Please read through her report. I'll be in touch with you in the next couple of days to discuss it with you in more detail. I will present the marketing strategy for the region that Linda and I have been developing over the last month. I believe it will strongly and permanently enhance our position in the region.

### **3. Define the Audience**

SCOPE

RELATIONSHIP

NEEDS

## 2. JOB FINDING SKILLS

### RESUMES

#### Chronological Resume

**MICHAEL PHELPS DAVIS**  
**218 Low Road**  
**Denver Colorado**  
**(303) 351-6113**

#### **Objective**

A sales position in a consumer products firm requiring initiative, sales experience, solid academic credentials, and proven communications and problem solving skills.

#### **Education**

2005-

**University of Denver**  
**Denver, Colorado**

Candidate for the Bachelor of Science degree in Business Administration, May 1992. Emphasis in sales management and marketing. Dean's List, three terms. Vice-president, marketing club. Co-chair, business career day committee.

#### **Experience**

Summer  
 2009

**Johnson's Drug Store**  
**Allentown, Pennsylvania**

Managed the consumer products counter for this two million dollar drug and department store. Sold over one-half of all store sales for three month period. Improved sales by 28%. Influenced buying decisions. Recommended new hires

Part-time  
 2008

**Salters Bookstore**  
**Denver, Colorado**

Ordered books for college-oriented bookstore. Simplified ordering process. Conceived new books rack at check-out counter.

#### **Personal**

Fluent in Spanish. Extensive experience with IBM personal computer. Enjoy tennis, American literature, and commodities market.

References available upon request



**Example 2**

BOB SAMPSON  
11 RANDALL AVENUE  
MADISON, WISCONSIN 53715  
(608) 433-2981

**EDUCATION:**

2009 B.A. Journalism, University of Wisconsin

**WRITING:**

- Wrote articles for the sports section of college newspaper.
- Had three articles published in city newspaper.
- Served as assistant editor of the sports section of college newspaper.
- Wrote sports editorials for the final edition of the Badger News - school newspaper.

**SPORTS:**

- Played four years college basketball.
- Nominated "Player of the Year" in state college basketball.
- Coached high school basketball players at summer clinic.
- Responsible for three High School players going to college with scholarships.

**COMMUNICATION/RADIO/VIDEO:**

- Announced live broadcasts of football games on college radio.
- Wrote and delivered nightly sports news for radio on football weekends.
- Assisted in developing basketball training via video.
- Delivered sports promotional spots on local college radio station.

**WORK HISTORY:**

2007- present BADGER NEWS, University of Wisconsin - Madison  
Assistant Editor, Sports Writer

2007-present BADGER RADIO, University of Wisconsin - Madison  
Radio Sports Announcer

2006-present CAYUGA BASKETBALL CLINIC, Green Bay, Wisconsin  
Summers Coach and Instructor

**COMPOSITION / ORGANIZATION:**

Elements follow form. Goal is to generate as many ideas as possible about your skills, accomplishments, and personal qualities that you can use as brushstrokes in a portrait you will create that will come as close as possible to the image of the ideal candidate in the employer's mind.

You need to explore everything you have done, whether on the job or in some volunteer position or extracurricular activity. List everything, regardless how insignificant it might seem. You can select the elements you want to keep later.

**Heading:**

- How can employer get in touch?

\* \* \*

**Objective Statement:**

- What job do you want?
- What in general terms are you offering employer?

**Objective examples:****MARKETING SPECIALIST**

Entry-level position requiring solid academic credentials, marketing experience, statistical analysis expertise and an ability to work as a team player.

**PRODUCTION MANAGEMENT**

Where strong communication skills, leadership, and a proven record of results in a manufacturing environment are required.

**ENGINEERING MANAGEMENT**

Entry-level engineering management position that requires a solid technical base and broad business exposure

**Education:**

- Where did you get your Bachelors degree?
- When do you expect to graduate?
- Did you develop any job related skills in class or in extracurricular activities?
- Did you receive any special on-the-job training?
- Is your grade point good enough to mention here?
- Is your education a more important credential than your work experience? If not, place education section after work experience.
- Did you receive any academic honors?
- Were you self-supporting during your time in school? (100%, 75%, 25%?)

**Example 3**

**LYNN J. ORTEGA**  
 1359 Observatory Road  
 Cincinnati, OH 45213  
 (513) 281-6642

**JOB OBJECTIVE:**

Entry level position in Personnel Administration.

**EDUCATION:**

B.S. Degree expected June 2007 from University of Cincinnati, Cincinnati, OH. Major in Marketing, Minors in Psychology and Speech Communication. Quality Point Average of 3.4 overall; 3.6 in Psychology Minor. "A" in Business Writing.

Personnel-related experience gained in coursework: Management course included practice in performance appraisal interviewing; Business Writing included practice in interviewing job candidates.

As member of Marketing Department Chairperson's Student Advisory Committee, acted as go-between for chairperson and students; counseled students on departmental policies and procedures. Appointed to departmental search committee to screen and interview candidates for faculty position.

In high school, served as editor of the yearbook, coordinating activities of four associate editors- scheduling and chairing meetings; responsible for writing copy and for deciding layout, Member of the debating team, winning second place in state regional debating competition. Graduated 16th out of class of 358.

**WORK EXPERIENCE:**

Sales Representative (part-time). Telemarketing Associates, Cincinnati, OH (telephone subscription sales). July 2002 to September 2005 Recruited, screened, and trained telephone sales personnel. Maintained records for the group. District sales leader for two years.

Sales Clerk (part-time). Casual Footwear, Montgomery, OH. August 2000 to September 2002. Duties included customer relations, inventory, display work. Gained valuable experience in dealing with dissatisfied customers. Designed and implemented training program for my replacement.

**MEMBERSHIP:**

Speech Club, Society for the Advancement of Management, and American Marketing Association.

**REFERENCES:** Available on request.

**Example 4**

**LYNN J. ORTEGA**  
 1359 Observatory Road  
 Cincinnati, OH 45213  
 (513) 281-6642

**JOB OBJECTIVE:**

Entry level position as Marketing Representative.

**EDUCATION:**

B.S. Degree expected June 2006 from University of Cincinnati, Cincinnati, OH. Major in Marketing; minors in Speech Communication and Psychology.

Quality Point Average of 3.4 overall; 3.7 in Speech Communication coursework. "A" in Business Writing course

Elected to Marketing Department Chairperson's Student Advisory Committee. Polled student opinion, representing student viewpoint to chairperson; explained departmental policies and procedures to students.

In high school, served as editor of the yearbook, responsible for writing and editing copy, deciding layout, coordinating activities of four associate editors, scheduling and chairing meetings of editorial staff. Member of the debating team, winning second place in state regional debating competition. Graduated 16th out of class of 358.

**WORK EXPERIENCE:**

Sales Representative (part-time). Telemarketing Associates, Cincinnati, OH (telephone subscription sales). July 2002 to September 2005. District sales leader for two years. Marketed wide variety of magazine subscriptions; recruited and trained team of four salespersons.

Sales Clerk (part-time). Casual Footwear, Montgomery, OH. August 2000 to September 2002. Duties included customer service, inventory, display work, operating and closing out of cash register. Handled some receiving and interstore shipping; trained my replacement.

**MEMBERSHIPS:**

American Marketing Association  
 Society for the Advancement of Management  
 Speech Club

**ACTIVITIES:**

Jogging, scuba diving, attending Cincinnati Symphony Orchestra performances, Friends of WGUC (Public Radio).

\* \* \*

### Work experience:

- How did you have an impact in jobs that you've held? Were you just a clock punching functionary or did it make a difference that you were there and not someone else?
- What did you accomplish? Be specific and quantify.
- What skills did you learn or demonstrate? Give examples.
- What in general terms did you do? Don't go into a long, boring list of your duties or responsibilities unless they are very impressive duties and responsibilities.
- What was your title?
- What was the name of the company?
- When did you work there?

### Style Issues:

#### Dull

1. Raised level of sales above previous year.
2. Started new employee programs that lowered turnover.
3. Handled bookings for elderly pop group.
4. Marketed new travel plan to corporations, increasing sales to \$19 million.
5. Worked for losing gubernatorial candidate for six months.
7. Hired and trained six new lion tamers during 1982-84. Only one serious casualty.

#### With Impact

1. Reversed negative sales trend; sales up 41% over prior year.
2. Created and implemented two new employee relations programs (flextime and job posting) that resulted in a 33% reduction in turnover.
3. Managed bookings, travel, and accommodations for sexagenarian sextet.
4. Initiated new market concept of packaging travel to corporations for incentive programs, resulting in sales of \$19 million (more than double expectation).
5. Organized and coordinated political campaign for leading gubernatorial candidate.
7. Recruited, trained and motivated six new lion tamers during 1982-84; five continue to excel.

## Example 5

**LYNN J. ORTEGA**  
 1359 Observatory Road  
 Cincinnati, OH 45213  
 (513) 281-6642

**SKILLS:****Planning:**

Devised and implemented program for training sales personnel in retail store, Scheduled meetings; planned agendas. Planned and met series of deadlines involved in publishing yearbook.

**Communicating:**

"A" in Business Writing course. G.P.A. of 3.7 in Speech Minor. College Speech Club; high school debating team, winning second place in state debating competition.

**Supervising:**

Edited high school yearbook, supervising and coordinating efforts of four associate editors; scheduled and chaired meetings. Society for the Advancement of Management.

**Selling:**

Sales Representative for telephone subscription service. District sales leader for two years. Gained valuable experience in dealing with claims of dissatisfied customers. American Marketing Association.

**Recruiting and Training:**

Recruited, screened, and trained telephone sales personnel. Marketing Department search committee to screen and interview candidates for faculty position. Practice with interviewing job candidates included in Business Writing course.

**Counseling:**

Performance appraisal workshop included in Management course. Counseled students on departmental policies and procedures as member of Marketing Department Chairperson's Student Advisory Committee.

**EDUCATION:**

B.S. Degree expected June 1985 from University of Cincinnati, Cincinnati, OH. Major in Marketing. Minors in Speech Communication and Psychology. Quality Point Average of 3.4.

**EMPLOYMENT HISTORY:**

Sales Representative (part-time). Telemarketing Associates, Cincinnati, OH. July 2002 to September 2005.

Sales Clerk (part-time). Casual Footwear, Montgomery, OH. August 2000 to September 2002.

REFERENCES: Available on request.

**Functional Resumes:**

- Stresses what you can do rather than where and when you did it. Easier to talk about unpaid work.
- Forces you to think in skills/accomplishments mode.
- Some recruiters don't like them.

\* \* \*

**References:**

- Two out of three should know you from work; the third should ideally have community stature.
- All should be good phone communicators.
- All should know they are references.
- All should be given your resume and any other background material about you that will make it easier for them to say good things about you.
- All should be warned to expect a call from the company when you become aware that such calls are likely.



## COVER LETTERS

Research the company--Get answers to these questions:

1. What are the product lines and market shares?
2. Who are the major competitors?
3. Is the company emphasizing price, quality, service, or differentiation? (Do you think that strategy will work?)
4. Is the company dependent on a small number of major customers? (This would be a risky situation - loss of a major customer means layoffs.)
5. Does the company have a broad base of customers?
6. Is the company the technology leader in its industry or does it follow others?
7. Is the company losing or gaining market share? Why?
8. When was the last time the company opened a new office or built a new facility?
9. Are there any new entrants to the market, e.g., foreign suppliers?
10. What is the track record of profits over the past five years?
11. What is the company's basic competitive strategy for the future?

### Strategy

Cover Letter Checklist: Broadcast type

- |         |  |
|---------|--|
| Opening | <ul style="list-style-type: none"> <li>•Do I have a name reference?</li> <li>•Do I need to get reader's attention?</li> <li>•How can I define reader's need or problem?</li> <li>•State that you are applying for a specific position</li> </ul> |
| Body    | <ul style="list-style-type: none"> <li>•Describe how your abilities are the solution to reader's problem?</li> <li>•Use reader benefit language</li> <li>•Show how you meet qualifications</li> <li>•Show you know about the company</li> </ul>  |
| Close   | <ul style="list-style-type: none"> <li>•Request interview</li> </ul>   |

May 19, 2XXX

Mr. Edward Cho  
Personnel Administrator  
Omnicon Corporation  
Norwood, OH 48214

Dear Mr. Cho:

Mr. Michael Schuski, an analyst in the traffic department of your firm, informs me that your assistant, Ms. Emily Langran, has resigned her position. I believe that my skills, work experience, and education will enable me to serve you well as your assistant.

As you know so well, Omnicon is automating more of its manufacturing functions through the use of robotics and many workers are being displaced. I understand that it is your responsibility to determine which of these workers are retrainable and to develop training programs for them. While I do not pretend to have the answer to this industry wide problem, I feel that I could contribute to the solution.

For example, I have experience at training homemakers in telephone subscription sales. I have served on a search committee for a new faculty member and my class work has given me practice in appraisal and employment interviewing. My experience as a clerk in a retail store has given me a background in dealing with the public, especially with the claims of dissatisfied customers that should serve me well in dealing with hourly employees. Moreover, my psychology minor has given me valuable insights into the mind of the displaced worker.

My strong background in speaking and writing will equip me for the communication tasks so vital in Personnel Administration. Please see the attached resume for further details.

As Omnicon confronts the challenges of a fast paced and growing technology it will need people who enjoy meeting a challenge who are not afraid of change. I hope to play a significant role in meeting the challenges of Omnicon's future.

Please call or have your secretary call me at 261-6642 to arrange a convenient time for an interview.

Sincerely,

Lynn J. Ortega

Enclosure

February 9, 2xxx

Mrs. Caroline Roberts  
Personnel Director  
Sundance Cruises  
4503 Stewart Street  
Seattle, WA 98104

Dear Mrs. Roberts:

I recently cruised to Mexico on the Stardancer and it was the best vacation I've ever taken. I was especially impressed with the enthusiasm, friendliness, and professionalism of the staff. As I feel I possess those same qualities, I am quite interested in joining your company as the athletic director for one of your ships. I feel that my three years experience instructing aerobics and weightlifting, along with my ability to work well with other people make me well qualified for this position.

My certification by both Aerobic Powers and the YMCA has given me up-to-date knowledge on exercise safety, and I also plan to be nationally certified within the next few months. Since safety is always important, and especially so on a cruise ship where many of the exercisers are elderly, I believe my training could be of special use to you.

As you will notice on my resume, this spring I will be graduating from the University of Washington with a degree in Psychology. This background, as well as my extensive experience in working with the public, has made me quite effective at dealing with people. My courses in special communication at the UW have also helped me to improve the communication skills that are so essential to the type of position I am applying for.

Other qualities I possess which could be assets to your company include my willingness to work hard and to continue to expand my knowledge and abilities. This is evidenced by my exceptionally high grades throughout my school years, and by the energy and enthusiasm I put into my job. The aerobics class I designed has quickly become one of the most popular classes at our club, and I have a reputation for being one of the most motivating, energetic instructors. My goal is to achieve excellence in everything I do.

As I believe I could more thoroughly convey my qualifications to you in person, I would appreciate the opportunity to meet with you for an interview. I will contact you next week to see which day and time would be most convenient for you.

Sincerely,

December 10, 20xx

C.R.S.  
13256 Northrup Way, #5  
Bellevue, WA 98005

Dear Sirs,

Do you need an organized receptionist, one who works best when things get busy and who still has a pleasant phone voice? Then I am just who you are looking for. I am currently seeking degrees in Economics and Business Administration at the University of Washington. With my education, experience, and abilities, I believe I have much to offer your company.

The most important characteristic I possess is that I enjoy dealing with people. For this reason, I have always held public contact jobs. For example, as an AT&T operator, I answered and assisted well over one hundred calls an hour. This meant that I spoke with hundreds of people during one day. And while working as a waitress, I had the opportunity to serve over fifty customers each evening. They would come in hungry and tired from their long days and often they would be impatient. I saw this as a personal challenge to develop some personal traits that would make people feel relaxed and at home while they waited for their meal. Not only did my personal style earn me good tips, often up to 25% of the total bill, but I acquired several "regular" customers who would frequently come in a request my table.

Leadership and organizing skills are also reflected in my experience as a Rotary Exchange Student. Being able to work well with others will be an asset in the receptionist position. Other useful preparation for the job you have available is described in the enclosed resume. Please phone me any afternoon at (206) 633-xxxx to let me know the day and time most convenient to meet with you.

Sincerely,

Enclosure: Resume

November 23, 2xxx

Data House, Inc.  
1414 Ala Moana Blvd. Suite 1400  
Honolulu, Hawaii 96817

Dear Mr. Anderson:

One of the major problems facing the information management industry today is programmers who are able to communicate with a computer but are unable to communicate with the end user. Too often problems can be solved in a fraction of the time at a fraction of the cost with a programmer who is able to communicate with both the computer and with people. Do you need a person with excellent programming skills and communication skills? If so please consider me for an entry level programming position with your firm.

Conducting tours and assisting with voter education presentations during my summers in the Voter Education and Community Relations division with the Lieutenant Governor's office has further enhanced my ability to deal with all kinds of people with all kinds of backgrounds. Furthermore, classes in basic, business basic, Cobol, systems analysis and design, and data base management have given me a good foundation and solid skills in programming. In addition, working with a Systems Engineer from IBM this past summer has given me hands on experience of setting up and maintaining a data collection system. Both experiences have prepared me well for a career in information management.

I would like to meet with you at your convenience to discuss the possibility of a mutually beneficial employment. I will be home for my Christmas break from December 18 to January 2. You can reach me in Seattle at (206) 547-xxxx. I am looking forward to hearing from you.

Sincerely,

9th February 2xxx

Warner Brothers Records, Inc.  
3 East 54th Street  
New York, New York 10022

Dear Personnel Director,

Here it is. The um-teenth resume to find its way to your desk just this week. Probably another young naivette looking for glamour and thrills in the music business...but wait -- this one looks good! This one has related experience. She even has a BA in Business.

This one is Lori Wentworth, and I'm seeking an administrative or publicity related position with your firm.

My experience in the entertainment industry includes office positions with a record label, a music publisher, a recording studio, a music magazine and two years in radio. Through this work I have developed a keen organizational sense and an ability to communicate (and get along) quite well with others. I am sure these qualities -- and those mentioned in greater detail on the enclosed resume -- are among those required of a productive member of your staff.

My accomplishments in past positions include the redesigning and streamlining of outdated filing systems, as well as creation of new ones. I have also cut company expenses through research and selection of more efficient and less costly services.

I would enjoy the opportunity to discuss the possibility of putting these skills to work for you. Please give me a call and we can arrange a meeting time according to your schedule, as mine is quite flexible at present. I can be reached by telephone on (206)443-0823 or by post at the address above. Travel is not a problem; just give me a week or so to make the arrangements.

Best Regards,

## INTERVIEWS

### Objectives:

- Ultimate: Get job offer
- Immediate: Present strengths, minimize weaknesses, evaluate company

### Audience:

- How will the interviewer be rating you?

### **Strategy:**

1. Prepare for likely questions.

2..Know your selling points

SET to Prove Leadership. "My greatest strength is motivating and leading others to achieve a defined goal. I have always had a high degree of energy and impatience to get things done. For example, I was elected chairman of the Homecoming Float Committee for three years in a row. I had the real challenge of supervising and coordinating the efforts of as many as fifty high school students to get the floats done on time. We received the first-place trophy for each of the three years - a record that still stands at the school. I continued gaining successful leadership experience during my college years as a class officer and as a project leader for our senior project. In that project I managed a team of eight engineering students whose prescribed goal was to design and build a concrete boat. I think I played a key role in building a great team spirit, and a little bit of each of us went down when she was sunk to become a fish haven. To summarize, I believe that these examples show that my greatest strength is leadership to motivate others to achieve prescribed goals."

3. Prepare your own questions

- To generate proactive energy
- To get clearer idea about interviewers problem
- To give interview direction if needed
- To show knowledge of company or industry
- To find out what life on job will be like

- To find out what future with company holds for you

4. Prepare summary for last pitch

5. Follow up with letter or note.

What about salary negotiations?



APPLICANT PROFILE - AMERI-CAN COMPANY

	INTERVIEWER:	
APPLICANT NAME:	DATE:	
ADDRESS:	LOCATION:	
GRADUATION DATE:	HOME PHONE:	
COLLEGE:	BUS. PHONE:	
DEGREE(S):	G.P.A. (MAJOR):	
GEOGRAPHIC PREFERENCE:	WHERE INTERVIEWED:	
HOMETOWN:	PERSONAL IMPRESSION:	
	1 2 3 4	
CITIZENSHIP:	COMMUNICATION SKILLS:	
	1 2 3 4	
POSITION:	LEADERSHIP: 1 2 3 4	
COMMENTS:	INTEREST: 1 2 3 4	
	ENTHUSIASM: 1 2 3 4	
	VOCATIONAL MATURITY:	
	1 2 3 4	
	COMPETENCE: 1 2 3 4	
	OVERALL RATING: 1 2 3 4	
ACTION RECOMMENDED:	MAKE OFFER	SECOND INT.
	TURN DOWN	REFERRAL

### 3. STRATEGY

Involves two separate steps:

1. COMPOSITION--Generating, collecting, selecting message elements. These are your resources--the information, ideas, data , arguments that will compose your message.
2. ORGANIZATION--Arranging/structuring these message elements in the way best suited to achieve your objective.

#### 1. Composition

**Goal:** Clarity about what you want to say and a complete list of elements you need to say it.

TO: George Kimball  
FROM: John Mason  
SUBJECT: Review of Headquarters Data Processing Capabilities and Potential Usage.

I went back to New York for a presentation the 15th of this month and I found it to be very informative. The sponsor of my visit was a gentleman by the name of Vern Grouper. Vern is the manager of the data processing operation at headquarters; that is, their centralized data processing operation. They've got quite a bit of power out there. One of the things that they do encourage us to do is to utilize their capabilities, their services, and experiences to whatever extent that will be beneficial to us.

It would be my initial observation that although they have a tremendous amount of computing capability that computing capability is directed toward a business dimension very much different than that of our division. However, there are certain services that might be performed in our behalf by headquarters. For example, we could utilize the people such as Vern to come back and address our data-processing advisory group since I am planning on convening that group on a monthly basis. We could invite Vern to give us an overview of what's going on at headquarters and what type of services he might offer in a service bureau mode of operation.

Overall, the trip was time well spent. I had an opportunity to meet my counterparts, to observe a number of the implementations that have been made, both in hardware and in software, and to meet with some key players who we can call on to explore the approaches that were taken by Headquarters. Another important area that I think we could make immediate use for, especially in Lon Harman's area, is the following. There's a lady by the name of Linda V. Monroe. She is the head of the Information Center at headquarters. This lady has an information center and a data-retrieval capability that delves into patents, delves into technical data from various periodicals and she also researches on-going product lines. She subscribes to a number of data-service activities, people who continually scour the publications, periodicals, the weeklies, the dailies, the Wall Street Analyst. I really think it would be beneficial for Lon Harman to visit with Linda and find out just how we might best utilize her services.

## 2. Organization

**Goal:** To organize raw message elements into a coherent, easy-to-read package.

### Some Organizational Principles:

MEMORY CURVE

DIRECT OR INDIRECT

## STRUCTURAL FUNCTIONS

- Beginning

- Middle

- End

Opening. To think about the components of a good opening paragraph, ask the questions: What exists? (background) Why write? (purpose) How organized? (preview)

In recent months employee complaints about the cafeteria facilities at Moldana have increased significantly. We are writing to you about the recommendations of the committee appointed to investigate the merit of these complaints. This report will focus on the three areas employees most frequently complained about: lounge decor, menu variety, and lounge hours.

- The "what exists" question focuses on the general background. It is a statement concerning the background or the context that has given rise to the need to send this message. " In recent months employee complaints about the cafeteria facilities at Moldana have increased significantly."
- The "why write" is where you state your purpose for writing. "We are writing to you about the recommendations of the committee appointed to investigate the merit of these complaints."
- The "how organized" provides the reader with a "preview" of the subtopics to come. "This report will focus on the three areas employees most frequently complained about: Cafeteria decor, menu variety, and Cafeteria hours."

Body: Clearly defined components that cluster information in coherent, easy to grasp information packets. In complex messages usually identified by a heading:

Cafeteria Decor

Menu Variety

Cafeteria Hours

Close: Focuses on the next step.

The committee will meet with Plant Services to determine the cost of making the suggested changes outlined above. We will then confer with the executive committee to develop a budget and plan of action to implement these suggestions

#### CREATING A DRAFT OUTLINE

##### 1. Develop list from composition exercise

1. Background statement about trip to New York headquarters.
2. Meeting with Vern Grouper.
3. Finding that HQ's resources are available for division's use.
4. Finding that HQ has tremendous data processing capability.
5. Finding that HQ's computing capability is used differently from division's.
6. Recommendation that Grouper and data processing group get together to find out how resources can be used.
7. Evaluation of the trip as time well spent and reasons why.
8. Finding that Linda Monroe has data retrieval resources that can be used.
9. Details about information services.
10. Recommendation that Monroe and Harman get together to find out how these resources can be used.

##### 2. Identify Central Idea/Theme. Ask yourself what idea seems to be at the center of all this. What ideas don't fit? Are these ideas important? If they

are, then your central idea isn't good enough. You need to find another one that encompasses all your important ideas.

3. Identify subtopics: Can central idea be divided into smaller components? Cluster all the other ideas around them.
4. Determine which elements are necessary for the opening and close. It may turn out that in your free-writing exercise you weren't thinking about your opening and close, so you might have to come up with new elements for each. The Mason memo has the elements we need. It's just a question of selection and proper arrangement:

The end result should look something like this:

#### I. Opening:

1. Background statement about trip to New York headquarters .
2. Major finding that Vern Grouper has invited division to use HQ's resources: computer capability and information services (How organized).

#### II. Body

##### A. Computing Capability.

1. Finding that HQ has tremendous computing capability.
2. Finding that HQ's computing capability is used differently from division's.
3. Recommendation that Grouper and data processing group get together to find out how resources can be used.

##### B. Information Services.

1. Finding that Linda Monroe has data retrieval resources that can be used.
2. Details about information services.
3. Recommendation that Monroe and Harman get together to find out how these resources can be used.

##### C. Time well spent:

- a. met counterparts
- b. observed operations
- c. initiated relationships

#### III. Close

- Response Mechanism

Notice the improvement in the draft that follows because it focuses ruthlessly only on those elements that are central to the message and expands on the elements that need fuller development:

2/14/06

To: George Kimball

From: John Mason

Subject: How we can use resources at Headquarters

I visited New York Headquarters September 15 to learn more about its capabilities. The data-processing manager, Vern Grouper, invited our division to use HQ's data processing and information services in any way we can.

**Data Processing.** Headquarters has a tremendous amount of computing capability. But because its data processing activities are very different from ours, we need to determine how we can match our needs to its capability. I suggest that we invite Vern to meet with our data processing advisory group so it could explore with him in detail ways in which Headquarters could give us computer support.

**Information Services.** Another possibility would be to work with Linda Monroe, head of the Information Center at Headquarters. She has a data-retrieval capability that covers patents, technical data, and product lines. She subscribes to a number of data-services that might be useful to us, particularly in Lon Harmon's area. I suggest that Lon visit with Linda to find out how we can use her services.

**Evaluation.** Overall the trip was time well spent. I had an opportunity to observe operations at Headquarters and to initiate relationships that can benefit us in the future.

Let's get together today or tomorrow to discuss taking the next step with Vern Grouper and Linda Monroe.

## 4. EXECUTION/EVALUATION

The execution and evaluation phases in writing usually go hand in hand. I think of the draft/revise process as involving three phases:

1. Block out information in a rough draft.
2. Make it easy to understand.
3. Correct mechanical errors.

### PHASE ONE

**Draft:** Block out information in a rough draft. You are working with your draft outline, so you know what you have to say, but you should approach the writing of this draft similarly to the way you conduct a freewrite.

- Write quickly and don't worry about your audience judging you.
- Don't worry about grammar and spelling

**Revise:** Add, cut, and paste. The objective of the phase-one revision is to make sure you have on paper everything you want to say in the order you want to say it.

- Check your organization and content against the draft outline.
- Expand certain sections that seem inadequately developed
- Cut or condense other areas that are not as important as you thought at an earlier stage.
- Make sure that message elements that appear in one section of the document don't belong in another section.

### PHASE TWO

**Revise:** Make it easy to understand. Objective here is to make sure you are getting your message across using the most effective formatting and language.



## Paragraphs:

### Example 1

Before launching on a memo, one must have a well-defined purpose in mind. He or she needs to find out who his or her audience, both primary and secondary, are and what information they want. It is also needed to differentiate the major points from the minor points so that the memo can be organized accordingly. Simple and common words or terminologies should be used instead of trying to impress the audience using his or her deep learning or membership in a jargon-speaking elite. The purpose of a memo is to get the idea across. Sentences should be short, less than twenty words. The verb "to be" should be used as infrequently as possible. Passive voice should be used in proper context, especially in political issues.

## Sentences

Problem: Do sentences have good style: Do they convey the appropriate strength, tone, energy?

### Version 1

Dear Mr. Scalpel,

As you realize, this litigious age makes it necessary for large companies often to take stringent measures not only to avoid conflicts of interest on the part of their employees, but also to preclude even the very suggestion of conflict. And since my company intends to submit a proposal with reference to automating the hospital's information flow, it would not appear seemly for me to be part of an evaluation team assessing competitor's proposals. Even if I were to excuse myself from consideration of the XYZ proposal, I still would be vulnerable to charges that I gave short shrift to competitor's offerings.

If there is any other way that I can serve the committee that will not raise this conflict of interest specter, you know that I would find it pleasurable to be of service as always.

Sincerely,

#### Version 2

Dear Frank,

Your comments relative to your respect for my professional opinion are most appreciated. Moreover, your invitation to serve on the hospital's data processing evaluation team is received with gratitude, albeit with some concern.

The evaluation team must be composed of persons free of alliances with any of the vendors submitting proposals. For that reason, it is felt that my services on the team could be construed as a conflict of interest.

Perhaps help can be given in some other way. Again, please be assured that your invitation has been appreciated.

#### Version 3

Dear Frank,

Thanks for suggesting my name as a possible member of your data processing evaluation team. I wish I could serve, but I cannot.

XYZ intends, naturally, to submit a proposal to automate the hospital's information flow. You can see the position of conflict I would be in if I were on the evaluation team.

Just let me know of any other way I can be of help. You know I would be more than willing. Thanks again for the invitation.

Sincerely,

Version 4

Dear Frank,

Thanks for the kind words and the invitation. Sure wish I could say yes. Can't though.

XYZ intends to submit a sure-fire proposal on automating the hospital's information. Shouldn't be a judge and advocate at the same time!

Any other way I can help...just give me a buzz. Thanks again.

Cordially,

\*\*\*\*\*

Strong Styles (Yang/Hot)

Weak Styles (Yin/Cool)

**Forceful**

- Use active voice
- Give orders--Use imperative
- Don't beat around the bush: step up front and be counted
- Use energetic radiating style: short sentences and paragraphs; clear, direct vocabulary
- Avoid weasel words like 'possibly', 'maybe', 'perhaps'.

**Passive**

- Avoid imperatives--never give an order
- Use passive voice heavily
- Attribute responsibility for negative statements to faceless, impersonal "others."
- Use fat paragraphs with long, convoluted sentences with a lot of jargon
- Use weasel words

**Personal**

- Use persons' names especially first names
- Use personal pronouns, especially 'you' and 'I'.
- Use the short sentences of ordinary conversation
- Use active voice

**Impersonal**

- Avoid using persons' names
- Avoid personal pronouns
- Avoid brisk, natural style
- Use passive voice

**Colorful style**

- Make it emotional, energetic, funny
- Use adjectives and adverbs, metaphors, similes, and other figures of speech.
- Be conversational or breezy
- Tell Stories

**Colorless**

- Avoid using adjectives adverb, and other "vivifiers."
- Blend impersonal with passive styles
- Use formal words and expressions to freeze out any semblance of wit, liveliness, and vigor.

Pointers regarding "the bread-and-butter" business style:

- -Don't be afraid to be friendly or personal. Remember the importance of goodwill.
- -Writing should sound like a living person--ok to be conversational (but not colloquial)
- -Contractions & personal pronouns ok
- -Active, action-oriented feeling
  
- -Visually formatted for easy reading
- Simple words, short sentences and paragraphs

**Make Your Sentences More Energetic**

1. USE STRONG, ACTIVE VERBS

-Avoid overuse of non-action or "state" verbs such as to be, have, seem.

The financial advantage of owning this equipment instead of leasing it is 10% after taxes.

2. FIND THE HIDDEN VERBS.

- In nouns with endings -ment, -ance, -tion to see if action is hiding in it that would be better expressed as a verb.

We will perform an investigation of the problem.

We hope that you have a lot of enjoyment during your vacation.

My argument here from the beginning has been . . .

- In gerunds as in the previous sentence—owning and leasing are hiding own and lease

### 3. USE ACTOR/ACTION/OBJECT CORE SENTENCE.

Further analysis of the competition is necessary to determine which financial institutions are strong and growing.

1. Who or what is doing the action?
  2. What is central action?
  3. What is the object of the action (if any)?
  4. State core sentence
  5. Build the other sentence elements around the core.
4. AVOID UNCONSCIOUS OVERUSE OF PASSIVE VOICE.

The carpenter hit the nail (active)

The nail was hit by the carpenter (passive)

The nail was hit. (passive)

#### How to identify the passive voice:

1. The object (or the receiver) of the action is the subject of the sentence.
2. The actor is deemphasized as object of the preposition "by" or omitted from the sentence altogether.
3. The verb is always the past participle compounded with a form of "to be."

#### When not to use the passive voice:

- When Passive constructions are vague, confusing, pompous sounding.

When the business plan is finished, it is suggested that it be rerouted for final approval.

- When it creates an abstract, vague, "state" feeling as a compound with the verb to be.

It is observed that many students are registering late for class.

- When it leads to wordiness.

It was recommended by the budget committee that the program be discontinued by the department. (15 words)

The budget committee recommended that we discontinue the program. (9 words)

OK to use passive voice:

- When you want to emphasize the object of the action.

Johnny Jensen, our shipping clerk, shipped your order on November 15.

Your order was shipped November 15.

- To deemphasize the actor

You waste my time.

Time is being wasted.

- To occasionally provide some variety to sentence structure.

**Word Choice:**

## 1. KEEP LANGUAGE SIMPLE AND EASY TO UNDERSTAND.

She manipulated the garment in a cogitative mode. 'Hmm,' she vocalized. 'This attire is verifiably marvelous. What is it constituted from?' 'From the most meritorious velveteen,' defined her interlocutor, simpering coincidentally. 'Is it?' iterated the party of the first part. 'That's felicitous.'

## 2. KEEP SENTENCES SHORT.

- They should average fewer than twenty words.
- Be concise. Watch for unnecessary wordiness.

-Avoid redundancies.

Past history

the color blue

visible to the eye

in conjunction with

free gift

mentally imagine

Avoid beginning sentences with 'What'.

What I mean to say is that I really didn't mean it.

I mean to say that I didn't mean it.

What annoys me is his always singing when I'm trying to sleep

He annoys me because he always sings when I try to sleep.

Avoid beginning sentences with the phrase 'The reasons is'

The reason is because I wanted to travel.

I did it because I wanted to travel.

-Get rid of wordy phrases where one word says it.

Avoid beginning sentences with "Being" or "Being that":

Being able to think creatively and different from the conventional way of thinking is my greatest strength.

My ability to think creatively and unconventionally . . .

help	be of assistance
about	in regard to, in the matter of, in relation to
although	despite the fact that
now	at the present time
if	in the event that

### 3. AVOID VAGUE ABSTRACT LANGUAGE WHEN MORE SPECIFICITY IS POSSIBLE.

- Sometimes two or more words are better than one.

large	six feet, ten inches twice the size of the sun
fast	45 miles per hour 40 assemblies per day
difficult	requires twice the time to complete

We marketed a new travel plan to corporations increasing sales significantly.

We initiated new market concept of packaging travel to corporations for incentive programs, resulting in sales of \$19 million (more than double expectation.

### 4. CHECK FOR POSITIVE EMPHASIS.

We cannot accept this alternative.

Let's adopt another alternative.



PHASE THREE: Correct mechanical errors.

The objective of this phase is to clean up any correctness problems. Look for:

Usage mistakes: Are you using words correctly? Develop antennae for words whose meanings you are not sure of--even if you use them all the time--and then look them up.

John found the dripping faucet aggravating.

He was anxious to get started.

It was fortuitous that my aunt was on the ferry that capsized.

affect/effect

nauseous/nauseated/nauseating

lie/lay

comprise/compose

fewer/less

principle/principal

Syntactical mistakes. Watch for these common mistakes:

The group of boys and girls have gone down the river.

My certification by both Aerobic Powers and the YMCA have given me up-to-date knowledge on exercise safety.

In order to improve, one must realize why they need to write.

Young and inexperienced, the task seemed easy to John.

Walking down the street, the fire hydrant sprayed John and Mary.

As the marketing director for the Seattle Times, I know you want what's best for your readers.

### Headings and Titles

- Emphasizing the central selling Point
- Highlighting benefits
- How to use action term
- Talking about Price
- Supporting Your Claims

## 5. INFORMATIVE MESSAGES

DIRECT/INFORMATIVE MESSAGES: "GOOD NEWS"

### Example 1

Date: January 4, 1994

To: All Teachers

From: Division of Supplies

Subject: Proposed changes in Packaging at the Division of Supplies

At the present time all high schools and other organizational units with unit numbers under 2000 have the privilege of ordering specific items for specific teachers.

The system is set up so that a separate picking/packing slip is originated for each individual room and the items are picked separately, as a privilege to these organizations. (Primarily high schools.)

At the present time the Division of Supplies is filling picking/packing slips based on the chronological issuance of these picking/packing slips, wherever possible.

A number of temporary measures will be taken in the Division of Supplies and Transportation services in order to eliminate the backlog of the delivery of supplies to the schools.

In order to increase the efficiency of the picking and the packing operation, thereby enabling the Division of Supplies to handle a greater volume of commodities in the same time frame, the Division of Supplies will eliminate the practice of handling each picking/packing slip separately and will combine as many as possible in one shipment.

This will mean that the schools will have to check the items, packed loosely in a carton with the accompanying picking/packing slips for the same category of commodities in one package, rather than having them picked separately by the picking/packing slip.

## Analysis

Problem: What is in the situation that gives rise to a need to inform or educate readers on matters about which they are neutral or open?

Objectives:

1. Want message quickly and easily understood.
2. Want reader interest involvement, and good will.
3. Need to clarify what I want reader's reaction or response to be.

## Strategy

Organization:

1. Use the direct approach
2. Structure:

Opening

- Establish issue in general terms
- Background, purpose (primary objective), preview

Body

- Develop details: Exposition & Synthesis
- Headings, charts, tables, lists, illustrations

Close

- Next step
- Response mechanism, secondary objective

## Analysis Exercises:

### Example 2

Dear Ms. Peddlar:

Since you are a new account with us, I'd like to stress the fact that all our books are sold to bookstores at a discount of 40 percent off the list price. You can return them only if they are mailed back to us--in salable condition--within 90 days.

We've sent the books you ordered, six copies each of three of our most popular titles. They should reach you soon. We hope to do business with you again very soon.

Sincerely,

John Maplethorp

### Example 3

Dear Ms. Peddlar:

Welcome! We look forward to doing business with you for many years to come and to providing you with titles of interest for the customers of Hometown Bookstore.

You will soon be receiving the six copies each of Throw Away Your Coal Shovel (list price \$9.95), Light Up Your Life (list price \$14.95), and How to Catch a Sunbeam or Two (list price \$1.95) that you recently ordered.

The books were sent via UPS and should reach you by January 15. All our books are sold to bookstores at a discount of 40 percent off the list price; an invoice is enclosed that details charges of \$96.66 plus shipping. The books can be returned for a refund if mailed back in salable condition within 90 days.

These books you ordered have all been steady sellers. Some other popular titles are described in our Spring catalog, a copy of which is enclosed. Just call me if you would like more information about the titles with which other bookstores are having the greatest success.

Sincerely,

John Maplethorp

## Customer-Company Communication Loops

164 Palm  
San Rafael,  
California  
February 16, 1974

Mr. Ray A. Kroc  
President  
McDonald's  
Oak Brook, Illinois

Dear Mr. Kroc,

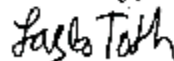
Recently I was driving to Pasadena, California, and I saw a billboard for McDonald's that made me start thinking. It showed an egg McMuffin, which looked very good, and next to it there was some jelly. Personally, I think a lot of people will not like the egg McMuffin with jelly. It would be like putting jelly on top of eggs!

I think that billboard will make a lot of people not order an egg McMuffin - even though I know they don't have to use the jelly if they don't want to.

It just makes me sad that the egg McMuffin looked so good and that jelly just goes and spoils the whole thing.

I write this just as a suggestion since I have enjoyed your hamburgers and fries so much and I would hate to see your fine organization be hurt by trying to be nice and giving out jelly, but it just doesn't go.

Sincerely,



Lazlo Toth



McDonald's Systems, Inc.  
McDonald's Plaza  
Oak Brook, Illinois 60521  
(312) 887-3551  
Direct Dial Number

March 4, 1974

Mr. Lazlo Toth  
164 Palm  
San Rafael, CA

Dear Mr. Toth:

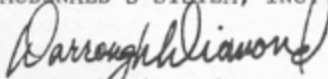
In our Egg McMuffin outdoor billboards we show jelly next to our newest product for one main reason--we have found that a lot of our customers take off the top half of the muffin and eat it separately from the rest of our Egg McMuffin product. The jelly is provided to make the top half, when eaten separately, taste even better.

And, just in case you haven't tried an Egg McMuffin yet, here's a gift certificate which should go most of the way to buy you one at your nearby McDonald's. (We think you'll find it delicious.) Or, you can use it to buy anything else you might prefer.

Many thanks for your letter to Mr. Kroc--and thank you for your continued patronage.

Sincerely,

MCDONALD'S SYSTEM, INC

  
Darrough Diamond  
National Advertising Manager

DD/lm  
cc: Ray Kroc  
Roy Bergold

164 Palm  
San Rafael,  
California  
March 13, 1974

Mr. Ray A. Kroc  
President  
McDonald's  
Oak Brook, Illinois

Dear Ray,

I got a letter from Darrough Diamond about a week ago where he said thanks to me for writing to you. That's okay, my pleasure.

He explained to me how people don't put the jelly on top of the egg but eat the top part separate from the egg part. Pretty clever! I went and had one like that and it did make the top half taste even better, just like he said.

Yesterday, I went over to my Mac place (that's what I call it, they all know me there) and I ordered a hamburger and asked for some jelly and they wouldn't give it to me. I told them how I was friends with you and all but they said they only give it out with the Egg McMuffin. I brought my hamburger home and split it up and used the top half separate just like Darrough suggested, but I don't see why I have to use my own jelly and the Egg McMuffin people get theirs for free. The top half of the hamburger bun tastes even better like that too. It's just not fair!

I see where you're up to 10 Billion hamburgers sold. How many more do you have to go?

Stand by our President!

Your friend,

*Lazlo*

Lazlo Toth



McDonald's Systems, Inc.  
McDonald's Plaza  
Oak Brook, Illinois 60521  
(312) 887-3551  
Direct Dial Number

March 21, 1974

Mr. Lazlo Toth  
164 Palm  
San Rafael, CA

Dear Mr. Toth:

Glad to know you tried the top half of the Egg McMuffin product with jelly, and that you liked it.

To your point about giving jelly with hamburgers, there just aren't many people who like hamburgers that way. Most people prefer ketchup, mustard, onions and pickles--the way we make 'em.

Thanks for your note.

Sincerely,

McDONALD'S SYSTEM, INC.

A handwritten signature in cursive script that reads "Darrough Diamond".

Darrough Diamond  
National Advertising Manager

DD/lm  
cc: Ray Kroc  
Roy Bergold



## INDIRECT INFORMATIVE MESSAGES: "BAD NEWS"

**Example 1**

Dear Murray:

Your invitation for me to act as industry chairperson for NCCJ's upcoming Anniversary Citation Dinner is a great honor. I thoroughly enjoyed serving in the role last year. Your members are a fine group with high ideals, and it was a privilege to work with them.

This year I'm involved with a construction project here at the hospital that is consuming all my time--and then some. So as much as I would enjoy repeating the experience of working with NCCJ, I'm afraid that I would be unable to give the assignment the attention it deserves.

Perhaps one of my colleagues would have the time to do the job the way it ought to be done. If you'll give me a call, I'll be happy to suggest some names for you. We want the health care industry to be well represented.

I wish you and the rest of your committee the greatest success in achieving the goals set this year by NCCJ.

### Analysis

#### Objectives:

1. Minimize damage to relationship: Bad news does not define relationship.
2. Show that decision is fair and reasonable: If reader was in your shoes, he'd do the same thing
3. State bad news clearly, firmly, and graciously:

## Strategy

<b>Opening</b>	<b>Buffer :</b>	Positive or neutral opening used to maintain goodwill by breaking the bad news gently
<b>Top Bun</b>	-Minimize damage to the relationship	
		praise appreciation resale
		-understanding -cooperation -good news
<b>Body</b>	<b>Reasons:</b>	Show you are fair and reasonable and make your case first
<b>Cheese</b>	-Make reader see it from your point of view	
<b>Meat</b>	<b>Bad News:</b>	Be clear & firm, but
	-Be clear and firm	<ul style="list-style-type: none"> <li>• Be brief</li> <li>• Be positive</li> <li>• Be low key</li> </ul>
<b>Close</b>	<b>Close:</b>	Appropriate goodwill gesture
<b>Bottom Bun</b>	-Bad news doesn't define relationship	-Help solve reader's problem

## Example 2

Dear Mr. Ruyle:

We appreciate your business this past year and expect to provide the same high level of service as you've received in the past two years. In addition to our accounting services, we offer expert consultation on the new tax laws and how they will affect your business. Our goal is to continue delivering the highest quality services at reasonable and competitive fees.

To maintain a high quality service level and increase financial benefits for our clients, we have carefully controlled our operating costs. However, in spite of our best efforts, they continue to grow.

Our supplies costs have risen more than 21% during the last three years. In addition, personnel expenses have increased over this period. Increases in utilities, rent, insurance, and taxes have also eroded our

margin to a critical level. Perhaps you have experienced similar effects in your business.

Despite these cost increases, our service fees have not changed during the past three years. Stringent cost control efforts will continue; however, we are increasing our fees as reflected on the enclosed invoice.

We encourage you to read the enclosed flyer, "Tax Changes--Effects on Small Businesses," and to return the reply portion as soon as possible. We will update you on the revisions and offer practical counsel to aid in your planning for 1987

Our high level of expertise, our individual service, and our competitive fees are designed with your interests in mind, and we intend to keep them that way. We highly value our client relationship, and we look forward to assisting with your accounting and tax needs this year.

Sincerely,

### Example 3

Dear Ms. Dillon:

We are delighted that you are interested in purchasing 60 Kirst Windsor Back Rockers. Remodeling time can be hectic, but I'm sure that your efforts will be more than compensated by the increased patronage the Savoy House will enjoy as a result.

In your letter of April 10, you mention the subject of credit. Normally we would be happy to discuss a payment plan with you, but a review of our records of your last purchase indicates that the payment was 90 days overdue when received.

We appreciate your patronage Ms. Dillon, but as a business professional, you can appreciate our cash flow problems when we have to carry an account for that period of time. This time we will gladly ship your order on a C.O.D. basis. Moreover, for a cash purchase, we grant a 5 percent discount which will save you \$1109.

We know that you will be happy with your Windsor Back Rockers. In addition to the comfort these chairs provide, we know that your guests will find in the Kirst Windsor Back Rocker a touch of colonial elegance added to their rooms. And we know that you will find them amazingly durable, retaining for many years their hard cherry finish. And as years

pass, the chairs continue to appreciate in value, becoming collectors' pieces.

If you call us at our toll free number (1-800-456-3487), the chairs will be shipped within one week via Bowie Express reaching the Savoy House within two weeks of your phone call. We look forward to serving you and the Savoy House, Ms. Dillon. If I can answer any questions please call me.

Sincerely,

#### Example 4

Dear Valued Customer:

Please accept our apologies on behalf of our supplier. Instead of sending you the 14-inch wok, we are forced to enclose a 16-inch wok. We trust that this substitute will not inconvenience you too much.

Also enclosed are helpful items to help you become a more accomplished Chinese chef. Later on you'll receive the skewers and cookbook--sorry they are not enclosed now.

Higby's stands ready to help you in all your culinary needs.

Sincerely,

H. Kissinger  
Customer Relations

#### Example 5

Dear Mr. Podgorny:

Thank you for ordering our professional Chinese wok set. Not only are wok-cooked foods delicious, but they are also quick to fix.

We've sent you an added bonus: 2 extra inches of cooking area, thanks to our supplier's generosity. The 16-inch wok is handier and more efficient than the advertised 14-inch wok. So you can turn out Chinese meals with professional flair, this package also includes a full range of utensils: cooking racks, cooking chopsticks, rice paddle, and steel turner, as well as a wok base and lid. Nor would your forays into Chinese cuisine be complete without skewers and cookbook, which will reach your kitchen by April 28, via UPS.

Remember Higby's offers a full line of cookware for the discriminating chef. We specialize in items with an international flavor. Why not stop by on May 5 for a free demonstrations on preparing Japanese sushi? You may also want to take advantage of our special prices on Japanese dishes and cookware, which will be in effect that week only.

Sincerely,  
Hank Kissinger

Analyze the following letter to determine its purpose.

### Example 6

Dear Professor Mackey:

We have included with this letter a list of videotapes films, slides, and other material that you may wish to order on the subjects of business mathematics and economics. Also included is a price list for these materials plus some other books you may wish to order.

Per your request, we are sorry to tell you that we cannot ship to you free examination copies of the books you requested as a result of reading a review in the Business Education Journal. The books, business Mathematics Made Easy by Chester Sims and Economics Made Easy by Joanna Wesson, are well written in spite of being about a subject most people find difficult. The cost of printing and publishing these supplementary textbooks is getting higher every year, so I'm sure you can understand the reason for our not complying with your request for free examination copies.

We must request prompt payment for these books. The cost is \$5.95 each plus \$1.00 per book for postage and handling. These books would make good additions to your college's bookstore, even if you don't require them in your classes, because they are helpful supplements to the primary textbooks your students are probably using now. Your students could use the extra help, we're sure. Let us know whether you decide to buy these books or not; the price is going up, so let us know soon.

**Example 7**

Dear Professor Mackey:

Thank you for your enquiry regarding two of our titles: *Business Mathematics Made Easy* by Chester Sims and *Economics Made Easy* by Joanna Wesson. We were very pleased with the reviews they received in the *Business Education Journal* that emphasized how these books make a very difficult subject interesting and understandable for the beginning student.

In your letter you asked whether we could send you free examination copies of each of these titles. We are not a text book publisher, and these books were not published as texts but for the trade to be distributed in bookstores. As you might know, publishers who specialize in text books finance such projects anticipating that perhaps hundreds of texts will be sent out to professors like you in the hope that they will adopt it for their classes. While we are gratified that you are considering adopting these titles for your business economics classes at the University of Washington, our budget for these books prevents us from sending out free examination copies. This is an important reason we have been able to price the books affordably at \$10.95 each. If you do choose to adopt, your students I'm sure will be pleased not to have to be paying the \$140 price typical of texts these days.

If you would like to take a look at each of these books without purchasing, I have been told by our order department that the University Book Store has copies in stock in their business section. You could browse through them there if you'd like or you could order them through us. Just add \$3.00 per book for shipping.

I enclosed with this letter a list of videotapes, films, slides, and other material that you might find useful in your business economics subject area. Please call me if you have any questions or if there is any way I can help.

Joan Gluck  
Customer Service

## 6. REQUEST MESSAGES

### DIRECT REQUESTS

#### Organization

Opening	Establish nature of request in general terms	Background, purpose, (rarely a preview)
Body	Give detailed instructions about how to comply with the request	Give reader info she needs to act <ul style="list-style-type: none"> <li>• date of purchase, model number, etc.</li> </ul>
Close	Action Steps	Tell reader exactly what to do: <ul style="list-style-type: none"> <li>• be tactful, but clear &amp; specific</li> <li>• indicate deadline</li> <li>• SASE, reply cards, etc.</li> <li>• describe benefits of acting quickly, if possible</li> </ul>

#### Example 1

Dear Mr. Ployer:

I learned a great deal at your firm and found that this training helped me a lot in the several marketing jobs I've held since then.

Now that I'm applying for the position of marketing manager at First Federal Bank, I'm hoping you can send a letter of recommendation to Mirella Highsmith, who is the president there. I've always wanted to head a department like this, and your letter could help me get the chance to do it.

I hope all is well at Investors Plus.

Sincerely,

H. G. Hauge

Notice the improvement in the following draft:

### Example 2

Dear Mr. Ployer:

Since leaving the marketing department of Investors Plus, I've worked as a marketing specialist for Southeast Bank. Right now I'm being considered for the position of marketing manager at First Federal Bank. A letter of recommendation from you would surely increase my chances. Would you write such a letter?

During my time with Investors Plus, I acquired a solid foundation for building a career in the marketing of financial services. The experience has proved invaluable. When I left your firm to begin working with direct mail and other forms of promotion for Southeast Bank, I hoped to make greater use of my background in media. The position I'm pursuing at First Federal would allow me to oversee the bank's account with an ad agency and to design programs for both television and radio coverage. As you'll see from my enclosed resume, I've had extensive training for these responsibilities. I have always wanted to combine my interests in media and marketing, and this job would help fulfill a long-held aspiration.

It would be wonderful if you could write, in the next two weeks, to Mirella Highsmith, President, First Federal Bank, 9065 Houston Avenue, San Antonio, TX 78200. (Ms. Highsmith plans to make a decision by December 15.) And please accept my best wishes for a profitable year at Investors Plus.

Sincerely,

H. Hauge.



### Example 3

To: Evelyn Whitelaw  
 From: Elaine Erdmer  
 Subject: Impact of Art

Our plans for Battery Park City are moving forward rapidly. We have currently reached the point when we need to plan the specifics of the art that will be incorporated in the development. But, as I'm sure you can appreciate, choosing the "right" art is a challenge. What works best in the commercial/retail environment?

We must balance the artistic/aesthetic dimension against the practicalities of our budget and our purpose. Our overall goal is to create a stimulating and exciting environment that will attract shoppers and tourists to the complex. But is this a realistic aim? Have other shopping centers benefited financially by incorporating art in the design of the center, and if so, to what degree? What types of art have been found to be most practical in shopping centers? Does a luxurious ambiance attract more customers? Does the income level of the customers rise in proportion to the aesthetic element? And what about tourists? Do they seek out a center because of its artistic merit? These are just a few of the questions that occur to me, and I'm sure you can suggest many more that merit investigation.

I know that these are difficult issues to quantify, but I have the utmost faith in your research ingenuity. Do what you can to explore the issues between now and July 7.

### Strategy

**Composition/Organization.** Let's look at how the letter measures up section by section:

**Opening:** The opening paragraph is not phrased in such a way that the main idea could not be misunderstood. There is some background information, but the questions are vague.

**Body:** The writer lays out many questions, but he gives them no focus. This would be ok if it were a quick freewrite, but as a final document it is very inadequate. Writer needs to more effectively package what he wants the reader to do. Condense questions into an easy-to-read list.

**Close:** Purpose of close is to give specific instructions to the reader to make it as easy as possible for her to comply with the request. The writer does not make clear in what form she wants the information--would a ten-minute chat on the phone do? There is no response mechanism. Deadline is ok, if indeed July 7 will give writer enough time to read and assimilate reader's findings.

Compare the first version with this improved draft:

#### **Example 4**

Date: 6/1/2007  
To: Evelyn Whitelaw  
From: Elaine Erdmer  
Subject: Impact of Art

Our plans for Battery Park City are moving forward rapidly. We have currently reached the point when we need to plan the specifics of the art that will be incorporated in the development. I need you to research the experience of other high-end retailers' use of art and design elements in their retail spaces.

Please put together a report regarding your findings about the impact of art in shopping developments. Specifically, we'd like to know:

1. How have other shopping centers benefited from the expense of high-quality art and architecture?
2. Who is most likely to be attracted by a luxurious ambiance: affluent residents, tourists, employees shopping at lunch time or after work?
3. What types of art have been found to be most practical in shopping centers?

Please summarize your findings in a five- to seven-page report by June 30. Also please plan to attend the July 7 development meeting during which we will discuss your findings. Call me if you have any questions about what we're looking for.

## PERSUASION

### Role of Emotion as Motivator

Researchers have studied the evolution of the human brain, and the brains of organisms that preceded us, including the apes who are our nearest neighbors, like chimpanzees, and bonobos, and the proto-humans who preceded us. They all had well-developed capacity for making decisions based on whether something made them feel frightened, or excited, or happy, or sad. Those feelings remain the basis of all of our judgments today. What has happened from an evolutionary standpoint is that we have added all kinds of levels of cerebral cortex that allow us to think more clearly about how to reach our goals, and to some extent have influenced the goals we pursue.

Last week I was in a parking lot, and my three-year-old started to wander away from me for a second. I didn't stop and calculate the likelihood of a car moving at a particular velocity towards her. I immediately felt scared, and I grabbed her and pulled her in towards me. Those gut-level feelings are at the root of everything that we do, whether it is how we decide who we want to marry, or whether it's about business decisions -- and it is behind our decisions on candidates. . . .

If you appeal primarily to people's reason without first getting them to feel the significance of the issue you're talking about, they're not going to be interested. From an evolutionary standpoint, our emotions play two major roles. One, our emotions appear to capture our attention, so if you don't make emotionally compelling arguments, if you don't use stories or examples to grab listeners, they won't hear important things you have to say. The other role of emotion, which is probably most crucial, is that emotions motivate us -- positive feelings pull us towards things that are generally good for us, and negative emotions move us away from things that are generally bad for us. They're not flawless, by any means, and that's why reason is so helpful to help us tell the difference between a false smile and a real smile, or between a plan that makes sense and a plan that doesn't.

Ultimately the goals that we pursue with those plans are primarily emotionally based. For example, why would I care about poverty? I'm a tenured professor, so I'm never going to be poor. So why do I care about poverty? It's not in my rational self-interest to care about poverty. It's not going to happen to me. But it does matter to me, because I have feelings about it when I see somebody else suffering. (From an interview with Drew Westen, author of *The Political Brain*. For full interview got to course website link that says articles..)

## Sales Letters

### Analysis

Problem: Need to sell product or service to an audience that is resistant, skeptical, and inclined to refuse.

#### Goals:

- Establish need
- Prove you have best way to meet need (primary benefit)
- Show how you have more secondary benefits
- Make it hard for reader to say No.

#### Audience:

- Understand motivators that will move audience to action.
- Anticipate objections and determine which need to be neutralized

### Strategy

#### Organization

Use AIDA format: Attention, Interest, Desire, Action

Opening	Get reader's <u>Attention</u> by: <ul style="list-style-type: none"> <li>• telling a story</li> <li>• painting a word picture</li> <li>• arousing curiosity</li> <li>• stimulating senses and emotions</li> <li>• promising a benefit</li> </ul>
Body	<ul style="list-style-type: none"> <li>• Develop <u>Interest</u> by using appeals: identify and stimulate reader needs for product/service</li> <li>• Build <u>Desire</u> for your product: describe it in reader-benefit language--how will it solve reader's problem?</li> <li>• establish uniqueness of your product</li> </ul>
Close	Ask for <u>Action</u> <ul style="list-style-type: none"> <li>• be clear about what to do</li> <li>• make it easy</li> <li>• give incentives to act quickly</li> </ul>

**Execution/Evaluation:** Use all three of the strong styles:

- Forceful in the close. Use friendly imperatives. Tell reader what to do.
- Colorful in the body where you describe your product
- Personal everywhere else

**Examples:**

Dear Mr. Blutarski:

If you are at all unsure what to purchase for the women in your life this holiday season, have we got a special message for you! Women love to feel beautiful, and there is nothing that will make a lady feel better about herself than an exciting new fragrance.

*Bianca* is this type of perfume. Created by Mick Jagger for his ex-wife, Bianca Jagger, this perfume is finally available to you exclusively at your nearest K-Mart cosmetic department. *Bianca* comes in a beautifully shaped mold taken of Mick's lips.

*Bianca* is many things to many women. Sexy women become sexier, innocent women become more innocent, smart women become smarter, and tall women become taller.

As the women in your life will undoubtedly use up their sixteen ounce bottle of *Bianca* as quickly as they can put it on, we also offer *Bianca* by the six pack and half rack. The empties would look beautiful filled with colored water and placed on your mantle. Women will not only thank you for this intoxicating scent, but will also admire your skill as an interior decorator.

We have proof that all of this is true. In a poll which we ourselves conducted, well over a third called *Bianca* "different." In fact, Mrs. Frank Hornblatt, of Dokie, Oklahoma, was quoted as saying, "It smells a darn sight better than some of that Frenchie toilet stuff." We feel nothing speaks louder for a product than a satisfied customer.

As you will undoubtedly be wanting to purchase *Bianca* in large quantities and as soon as possible, your local K-Mart has a large stock on hand. Just look for the flashing blue light with the big red lips. Hurry, you don't want to disappoint your mother, sisters, or girlfriend. They will love you more than ever for helping them smell exactly as Mick Jagger thinks a woman should smell.

Sincerely,

## Persuasive Requests

### Analysis

Problem: Need action from an audience that is resistant and disinclined to comply

Objectives:

1. Need to establish seriousness of problem that your request is designed to solve.
2. Need to show how your solution will bring the most benefits. Look at pros & cons of other possible solutions; show how yours is the strongest.
3. Be clear about action request and deadline for completion

Audience: Scope, relationship, needs

### Strategy

#### Organization

##### Function/Objective

###### Opening

- Start where there's agreement and no controversy

###### Body

- Develop problem and solution in its details

###### Close

- Next step

##### Tools:

- Develop common ground (optional).
  - What goals do you share?
- Define in general terms shared need or problem.
  - Establish need for action.
- Dramatize impact of problem
- Explain your solution
  - Show why other solutions won't work
  - Be clear, objective, rational in explanations
- Deal with objections
  - Show that positives outweigh negatives
- Discuss benefits
- Tell reader exactly what to do & when
  - make it easy to comply
  - state benefits of acting quickly

**Example 1**

February 16, 1992

To: All Staff Members  
From: Melissa Gutridge  
Subject: New Sign-Out System

Successfully mainstreaming our clients into the community is very important and daily interaction with the public is necessary. Our clients enjoy the times they get to go to the mall or out to lunch, instead of remaining here all day. Previously, when a client was taken out for an activity, staff at the front desk knew exactly where the client was and whom the client was with. Recently, there has been a problem with this. Clients are being taken out on activities without staff at the front desk knowing that the client has left our facility.

Last week Janet's father stopped by to pick her up for a doctor's appointment and she was not here. No one knew where she was or whom she was with. Naturally her father was very upset and wanted to know what kind of program we were running. The front desk's not knowing where our clients are and whom they are with is damaging to the good reputation of our staff and program.

Next week a sign-out board will be located at the front desk. Please write down where you and the client are going and when you will be returning. When signing out, try helping the clients sign themselves out. We can turn this into a learning experience for our clients. Then when a family member or social worker stops by to see someone who is not here, we can simply look at the sign-out board and tell where the client is and when the client will be returning.

Starting Monday, February 23, please help keep up the superb reputation you have helped Westar earn as a quality center for handicapped adults. Sign out yourself and clients at all times.

**Example 2**

Fellow Restaurateur:

We are writing to you about a close friend of ours, Rudolf Mercarz, who is a candidate for the Seattle City Council. We would not impose upon your time or mailbox if we did not believe that this is a message that might help all of us in the future.

Rudolf has been a fire fighter and police officer for almost twenty-five years. He knows our city and our citizens as few do. He is a past president of the Seattle Police Officers' Guild and is familiar with the workings of city government. He has been a responsible leader and an able negotiator. From our position as business people who care deeply about this city, Rudolf Mercarz is the candidate we want elected.

Even though Rudi is considered the front-runner in this election, it behooves those of us who support him to raise funds early in the campaign. Therefore we are assisting him in a fund-raising auction to be held on July 17th at 7:00 P.M. at the Moose Lodge, located at 222 Mercer Street.

We are inviting owners of unique and prestigious restaurants to join us in one or all of several options. First, if you are interested in assisting, we would greatly appreciate a donation of a non-returnable platter of hors d'oeuvres that are a specialty of your establishment. We will make arrangements for pick-up, and appropriate credit will be given so that the 300-500 distinguished guests will know where to find these delicacies again. Secondly, we are asking for a contribution in the form of a gift certificate that will be auctioned to the highest bidder. Lastly, if you would like to attend the auction or contribute in some other way, we would be happy to make the necessary arrangements.

Thank you for your time. We understand all too well how valuable that commodity is. It has been a pleasure to meet you through this letter and to help our friend, Rudolf Mercarz, in this small way.

Sincerely,

Leona Helmsley



**Example 3**

Dear Julia:

You are probably aware that in the coming year the Seattle City Council will be dealing with several issues that will have a serious impact on Seattle restaurateurs. Perhaps the most important is a proposal to introduce a special tourist tax that restaurants and hotels will have to pay to finance the building of a new baseball stadium.

We love baseball, and we support legislation that will help to finance a first-class baseball stadium in our city, but we do not think that it is fair that our industry should be singled out to bear the full burden of paying for it. Fortunately there is something we can do right now to help prevent this punitive new tax law from being passed.

*[No need for more problem development here because the negative implications are well known by the audience.]*

We need to work to support the election to the City Council of Rudolf Mercaz. Rudolf has clearly stated his opposition to this legislation, and has proven himself to be a clear and effective advocate for issues supported by small business.

As a lawyer who has represented the Seattle Chamber of Commerce in previous litigation with the city, he is extremely well versed in municipal law and has come over the years to understand the problems and pressures business people in this city face. He also has a special knowledge of the restaurant industry since his father and now his brother Angelo own and run Bolla Bolla, the well-known Italian restaurant on Capitol Hill.

He is running tight race against Max Waterhouse, who is chiefly concerned with environmental issues and who has stated that he thinks this tax penalizing the tourist industry is a good idea. At this point there is no clear leader, and Rudolf needs all the support he can get.

On July 17 at 7 o'clock p.m. we are going to hold a fund-raising auction/rally for Rudolf's campaign at the Moose Lodge at 222 Mercer Street on lower Queen Anne. You can help to make this the big success we hope it to be. You can show your support by contributing a platter of hors d'oeuvres and by donating a gift certificate, which we will auction to the highest bidder.

But more importantly we hope that you will attend the rally yourself. Since we have invited the media, it is important that we make a good show of support for our candidate and for our cause. We need to send a

message to the other council members, especially those still sitting on the fence regarding this issue.

We will be calling you in the next couple of days to arrange to pick up your gifts on the morning of the 15th. We would also appreciate very much any time you could donate in helping to set up for the rally. We plan to make this a fun, exciting event, and we want you to be there.

Sincerely,

Leona Helmsley

#### **Example 4**

To: All Sales Representatives

From: James Christopher Smith

Subject: Improving Service of Customers' Phone Orders

All of you have told me that your customers are experiencing difficulties in placing orders because all of the phone lines are tied up, and that some customers are ordering from other wholesalers as a result. This is causing you a loss in sales commissions.

The recent opening of the Johnson Wholesale in Decatur has made competition in our field of wholesale drugs even keener. With the addition of this new warehouse, Johnson can service customers in all our sales areas almost as quickly as we can, and for approximately the same price. This new availability makes it even easier for our customers to call Johnson's instead of us. In fact, Glenn and Jack report that Walgreen's has increased its business with Johnson's from a sixth to a third of its total drug business. Sue and Jerry also say that several of the small independent drug stores in central Illinois, such as the ones in Effingham and Tuscola, have switched to Johnson's from us. With competition as fierce as this, we must make ordering from us a quick and easy operation.

Most orders are phoned between 9:30 and 11:30 in the morning and 1:00 and 2:00 in the afternoon, according to the times indicated on the order forms from last month. The phone operators, however, report that the lines are tied up throughout the day, usually by calls from the sales department. In order to relieve congestion, then, it is necessary to reduce phone activity in the sales department.

This reduction can be made by using the pay phones for personal calls during the peak ordering hours. Calls on company business should be made during non-peak hours too, if possible. This will enable us to keep more lines open during the peak ordering hours without spending money on costly new lines.

With the lines open to incoming calls, customers will find that they can place their orders quickly and easily. This will encourage them to keep calling us instead of our competitors, which can mean greater sales for you. In addition, good service helps build goodwill which may enable you to get a bigger share of your customers' business. The easy phone ordering service will also serve you as an additional selling point for new customers.

In order to improve customer relations and realize greater sales, then, use the pay phones for personal calls between the peak hours of 9:30-11:30 and 1:00-2:00.

## 7. BUSINESS PLANS

### PROJECT:

Your group will come up with an idea for a new business and then develop a plan that you will present to the class playing the role of potential investors in an attempt to persuade them to give you the capital you need to start your business.

### **Grading**

I will grade your plans based mainly upon the communications effectiveness of your group's presentation. In other words you will be evaluated according to persuasive content, delivery, and your effectiveness using visual aids to support the presentation. (See evaluation sheet on p. 72) I don't expect you to do a lot of original research for this project. You can make up data, but it should be believable. Many groups have contacted business people in the community who have begun or are running businesses similar to the ones the group presented to get some "real-world" advice about how to proceed.

### **Approach**

In the past I required both a written and oral version of the business plan from each group. Now I require only the oral version. In order to generate the information for the oral report, though, you will have to go through the same kind of compositional process as if you were writing it. The Work Plan assignment will be a tool to help you to do this.

If you were to write a written version of your business plan it would have primarily a "tell" function; the oral presentation of the plan has primarily a "sell" function. In other words, your oral presentation has primarily the function of a persuasive exercise. While you will support your persuasive strategy with data and explanations, this should not be an exercise information dumping. The information is only important insofar as it supports your goal of persuading your audience to give you the capital you need to start your business.

### **Logistics**

The oral presentation will be videotaped. You will have twenty minutes to make your presentation. Everyone in the group should play a part. I will leave it to the group to determine which role each group member will play. It is possible for someone to get up more than once. There will be an additional five minutes for questions and answers. You will lose points if you go over your total of twenty-five minutes by more than a minute or two.

## THE PRESENTATION

### **Analysis**

Problem: You need capital to start a business.

Solution: Develop a business plan as a tool to solicit investment capital from prospective investors>

Audience:

- Bankers
- Venture Capitalists
- Corporate Management
- Distributors

### **Strategy**

Since this is a persuasive exercise, you need to work with the tools of persuasion we have already been working with. You need to direct your presentation to the needs, desires, dreams, and aspirations of your audience:

First Persuasive Task:

- You want to get the investor's attention
- You need to motivate them, to get them excited
- You need to appeal to their investment objectives and how your offering meets those objectives.

Second Persuasive Task:

- You need to convince your investor audience that you have a well-thought-out business idea that will help them achieve their goals.
- You need to them that there is a market for your product or service;
- You need to demonstrate that you have the management and operational skill to accomplish what you set out to do;
- You need to demonstrate that you will be making enough money to provide the returns to your investors that you promise.

## AUDIENCE PROFILE FOR ORAL PRESENTATION

Create a short profile of your imagined audience--the audience role that the class will play--and present it to the class in a written handout before the taping of your presentation.

Your profile should answer these questions:

Who? Name of company and nature of its business

Type? What are roles of individuals in management group you are addressing and how their corporate culture or personal disposition shapes their attitude toward your presentation?

Relationship? Are you an outside consultant or an employee? How well do you know audience? How much credibility do you have?

Need? What is their problem? What need does your presentation address?

We will assume that audience is resistant to or skeptical about your business recommendations. Your job is to win them over.

ORAL PRESENTATION EVALUATION      Your Name \_\_\_\_\_

Group Name \_\_\_\_\_ Section/Group# \_\_\_\_\_

Give a number grade for your evaluation of their overall job in the three areas listed below A+=100; A=95; B=85; C=75; D-=60. Use spaces to give each student constructive feedback:

Speaker Delivery

Content/Persuasiveness

Visual Aids

Name:
Name:
:
Name:
Name:

Name:

Name:

Questions:

General Comments:

Overall Grade\_\_\_\_\_



Group # \_\_\_\_\_ Business Name \_\_\_\_\_

### PEER EVALUATION FOR GROUP ORAL PRESENTATIONS

Part of a student's grade for the oral presentations depends on a peer evaluation. Please list the names of your group members below, including yourself. Then assign each member the percentage you feel they deserve in terms of their contribution to the project. If a member did their fair share, give them 100 %; if they've done less or more give them less (e.g., 95) or more (e.g., 105).

If your group grade is an 85, everyone who receives an average mark of 100 will receive a project grade of 85, but if you are marked 95 your project grade will be 80 ( $85 \times .95$ ) or if 105 your grade will be 89 ( $85 \times 1.05$ ).

If there are five people in your group, the total in the % Points column should be 500; if there are six, the total should be 600. In other words, if someone gets more than 100, then someone else has to lose the equivalent points, as in our 105/95 example.

Group Members	% Points
1(Your name) _____	_____
2 _____	_____
3 _____	_____
4 _____	_____
5 _____	_____
6 _____	_____
Total	_____

## GROUP MEETINGS

There will be some class time allotted to you for group work on the business plan. Plan to use effectively this time and the time you will almost certainly need outside of class to meet

Group work is "real world," and while some students resent that a part their grade depends on other people, it is an opportunity for them to show the kind of leadership that might be necessary when involved in similar group projects once they are in the work world.

This is a communications course, and so your ability to work effectively with your group members, that is, to communicate effectively with them, should play a role in your grade. If problems arise in the group, you need to solve those problems. If you don't know what to do, talk to me about it.

The grade you receive for this project will be determined in part by how group members evaluate your contribution to the final result. (See attached evaluation.) If you are surprised by being graded lower than you expected by them, that shows you are not communicating very well and you deserve to get the lower mark on those grounds alone. If you suspect there is a problem developing between you and the group, talk to me about it, and it may (it may not) have a softening effect on your final grade depending on how well I think you handle the problem or to what degree I think you brought the problem on yourself.

### How to Run a Meeting

#### **Analysis**

Be well-prepared:

- Know your purpose
- Appoint a meeting coordinator
- Prepare an agenda
- Invite only those people for whom the meeting is relevant

#### **Agendas**

Agenda should make clear:

- Why you called the meeting
- What meeting should accomplish

- Who should attend

- What is time limit

Elements:

- Start with a one-sentence statement of purpose and time limit.
- Follow with a list of topics, prioritized and in logical order
- Meeting should deal with related topics

Execution: Job of meeting coordinator

- Be prepared
- Keep things on track
- Make sure everyone contributes
- Keep focus on solutions, not problems

## WORK PLANS

A useful tool in helping you to develop an attack strategy for your oral or written report is the **Work Plan**. Its purpose is to help you get organized, especially if you are writing a group report, and to identify the areas in which you need to do the research required to generate the elements that will make up the content of your report. Here is a basic description of its parts:

- **STATEMENT OF PROBLEM/S:** What problems are you looking at that the report will solve or help to solve?
- **DESCRIPTION OF CONTENT OF REPORT:** Describe the subject of the report in general terms. What themes will it address?
- **RESEARCH OUTLINE:** Define the areas where you need information. Brainstorm, freewrite, or list quickly to determine the questions that need answers and cluster them in an outline form.
- **RESEARCH TASKS:** What do you have to do to obtain the answers for the questions identified in your research outline?
- **SCHEDULE/DIVISION OF LABOR:** Determine the sequence of task required to complete the report, assign responsibilities to get tasks done to group members, and set deadlines for completion of these tasks.

Sample Workplan:

### HealthClub Work Plan

**Statement of Problem:** Owners want report that evaluates the feasibility of opening a new HealthClub in one or all of the following locations: Edmonds, Bellevue, or Boeing/Renton.

**Report Content:** Report will present research findings and our evaluation of their meaning and recommendations about the action HealthClub should take regarding expanding their business.

#### **Research Outline:**

Customer Base for Edmonds, Bellevue, Boeing/Renton

- Demographic information for each?
- Questionnaires to find out what people want

Competition in each location

- how many health clubs?
- exact locations?
- demographic profile for members?

- strengths and weaknesses of each?

Five Year Projected Expenses/Income for each location

- Membership projections?
- Income from membership fees @ \$1000, \$1250, \$1500/yr?
- Income from concessions?
- Expenses?

Capital Needs

- Five-year cash flow for each location?
- Breakeven point?

#### Research Tasks:

- Demographic research in library.
- Market research questionnaire.
- Collection information on Competition.

#### Schedule/Division of Labor

Mary	Feb. 7	Questionnaires designed
	Feb. 15	Questionnaires printed
	Feb. 22	Questionnaires distributed in each location
	March 7	Questionnaires distributed in each location
John	Feb. 21	Demographic data for each location compiled and analyzed
	March 15	Information about competitors collected
Group	March 16	Meeting to discuss data collected and to give Jim information he needs for financial projections
Jim	March 29	Financial projections completed
Group	March 30	Meeting to analyze information and develop recommendations to be made to client
John	April 5	Detailed draft outline completed
Group	April 6	Meeting to discuss draft outline adjustments
John	April 15	First draft completed
Group	April 17	First draft read and suggestions for revision made by group

John      April 24      Final draft completed

## 8. THE PRESS KIT

A press kit is a publicity tool. It packages several documents that provide information about an organization or its products or services. While some organizations use it as a general information packet, we will focus on developing a press kit that has a more narrowly focused objective, namely as a tool that will help in supporting a pitch to media to cover an event sponsored by your organization.

I'll be talking about the basic strategies for developing the basic pieces in the press kit. I'll be bringing examples of press kits done by students in previous classes, and there will be several examples of the different documents you will be expected to produce on the class website. Here's a basic description of the assignment

### Press Kit Assignment--125 Points

The communications department of a consumer products manufacturer who has just developed an innovative new product introduction has just hired You. Your boss calls you in, describes the product to you, and tells you he's handing the ball off to you and wants to see how well you can run with it. He wants you to prepare a press kit that will be released to the media as part of a massive strategic marketing campaign.

Choose a fantasy product of your own creation and develop a press kit for it. Information about what goes into a press kit will be presented in the next week. A cover letter, press release, and at least two other items—(e.g., a brochure, a backgrounder, biography, a short feature article, etc.) are required at a minimum. There is a number of "points" that you have to reach in order to have an acceptable project, and I'll lay out how the point system works in class by showing you examples. Here are the basics:

- It is due on date indicated on the syllabus.
- You can work either alone or with one other person on this project.
- You can do a press kit that relates to your business plan idea
- If you have another idea that doesn't fit what I've described above, tell me about it.
- Have fun with this. Give it some style and imagination.

## THE COVER LETTER

The cover letter is a type of persuasive request. It's a pitch letter to a media decision maker. Your goal is to give your company some media coverage. You should be clear about what kind of coverage possibilities there will be. Will there be a newsworthy event? Will there be a press conference? Do you want an interview?

As the example below and others on the website show, the basic strategy follows this pattern:

**Opening:** Establish credibility. If no one has ever heard of you before, piggy back on the credibility of another organization

**Body:** Establish what is media worthy about your event. Answer question your audience has as he or she is reading your letter: Why should I care? Don't ask for any favors. You need to make your case that you have something the media person reading your letter wants to present to his audience. She needs interesting content for her magazine, newspaper, or TV show. Make your case that you have what she needs.

Provide an annotated list of elements in the press kit briefly describing the usefulness of each item.

**Close:** Make clear what you want your reader to do. Don't leave it up in the air.





*Turtle  
Productions*

February 28, 2001

19207

Sixty-third

Avenue

Northeast

Seattle

Washington

98155

Telephone

206-402-8711

Facsimile

206-488-3090

Mr. Ed White  
Planning Manager  
King TV  
333 Dexter Avenue N.  
Seattle, WA 98109

*Very generously  
written*

Dear Mr. White:

This coming year, Children's Hospital will help over 2,500 children fight cancer. They can't do it without community support. We at Turtle Productions are delighted to be the 2001 sponsor of the annual fundraiser to benefit the hospital's Cancer Research Center. ✓

We know from past experience that the Greater Seattle community is eager to support the work of Children's Hospital. All that's needed is for the word to get out – and there's no better way than TV coverage.

Edgar Martinez has generously agreed to host our exciting kick-off event scheduled for March 1. He will personally deliver a gift (donated by our company) to each of the oncology ward patients. Because Mr. Martinez is one of the most popular Northwest celebrities and a highly respected citizen, we believe that your viewers will enjoy coverage of his interaction with the children and appreciate information on how they, too, can support this worthy cause.

We've enclosed a press kit that includes: a press release with complete information about the fundraiser, the kick-off event, and our company; a glossy color photo of Adam (Children's "poster boy") hugging his pillow, and information about our product – Pillowgrams - the primary vehicle for raising funds.

We hope that King 5 News will attend the kick-off event and help us promote this worthy cause. Please call me if I can answer any questions.

Sincerely,

*Ruth Bechtel*

Ruth Bechtel  
President

## THE PRESS RELEASE

The press release is a type of news story. It follows an inverted pyramid strategy that I'll explain in more detail in class. But here's the basic sequence of elements:

1. **Lead:** First sentence answers questions who, what, when, and where. It's followed by a sentence or two that describes what is unique, or if not unique, compelling, or if not compelling at least minimally interesting about the story.
2. **Exposition 1:** Goal here is to clarify the basic story concept in general terms so reader is oriented enough to read on to find out more details. If the question: "What's that about" is raised by the Lead paragraph, exposition 1 seeks to answer that question.
3. **Synthesis:** As a reporter your job is to report the facts and not editorialize about what you think is interesting or important. Let the facts speak for themselves. But you can get quotes from credible sources—witnesses, company officers, participants, etc., who can give their opinions about what is interesting and important about the event you're covering.
4. **Exposition 2:** Exposition 1 laid out the basic concept; in Exposition 2 you can go into more detail for those who are interested in a deeper understanding of the event. Technical information, if relevant, can be presented here.
5. **Future Focus:** If this is a developing story, you can indicate to the reader what he or she should expect coming down the road
6. **Past/Background:** Unlike other documents we've described in this class, background comes near the end. It's old news, and news stories are focused on what's happening now or is about to break. But at this phase in the story, you can provide any background information that the reader might find helpful.
7. **Miscellaneous:** Filler material that relates to the story in a limited way.

See example below and on the class website.

**PHILIPS • MAGNAVOX***Bringing Tomorrow's Technology Today™*

3201 Oak Grove Dr.  
Grand Oaks, IL 23410  
703/555-2000

Contacts: Gerry A. Simone  
703/555-4478 (Media)

John C. Taylor  
703/555-4401 (Investors)

**FOR IMMEDIATE RELEASE**

**Philips - Magnavox to Launch Web-TV™; Bringing the Internet to Your TV for Less than \$200**

Grand Oaks, IL—Philips - Magnavox (NASDAQ: PHG), a leading provider of entertainment technology, announced today that it will start shipping Web-TV™ to stores nation-wide on the first week of April 1997. Web-TV™ allows easy access to the Internet's World Wide Web with only a television set and a standard phone line. Philips - Magnavox is first to offer this cutting-edge technology at an affordable price, thereby opening the doors to the Internet for the general public.

The unit, slightly smaller than a video recorder, comes with a detachable keyboard and a pointing device. To get on-line, the user simply dials his Internet service provider, and the Web-TV™ will display a user-friendly web-browser on the television set. Users experienced with Netscape's Web-browser will find the interface very similar to what they are used to.

"For the consumer, this is certainly a money-saver," Vice President of Marketing Roy N. Adams said. He emphasized that, "Earlier, access to the Internet was only possible for people with expensive computer equipment. Now, we are

---more---

**PHILIPS • MAGNAVOX launches WEB-TV™** ---2-2-2 ✓

able to offer an affordable, easy to use product which targets a group of consumers as large as the television market."

Web-TV™ will be introduced at a suggested retail price of \$199. Similar products with less advanced features have been selling for over \$350.

Philips - Magnavox has designed Web-TV™ to be easily upgraded when new plug-ins (a small program designed for a specific task, such as showing animations, video clips and synthesizing speech) are developed. The plug-in is simply downloaded over the Internet and stored on an on-board microchip, which stores data much the same way as a hard drive in a personal computer.

Commenting on future prospects, Philips - Magnavox Chief Executive Officer Brian Thompson said, "The potential for this product will ultimately increase Philips - Magnavox's margins." He also pointed out that its recent innovation "is expected to bring in a decent profit for years to come, adding to the already solid income statement."

Philips - Magnavox plans to introduce a version of Web-TV™ later this year, which connects to the Internet through the existing cable television network, thereby eliminating the use of a phone line. Philips - Magnavox announced earlier this week its intention to enter a strategic alliance with the cable network VIACOM. Through this agreement VIACOM will offer Web-TV™ to its customers at a significantly reduced price when their customers sign up for a one-year subscription to the Internet through VIACOM's own cable network.

Philips and Magnavox merged in August 1995 to form Philips - Magnavox. The strategic merger has enabled the company to develop a more diversified line

---more---

PHILIPS • MAGNAVOX launches WEB-TV™ 3-3-3

of products, targeting new markets in the Americas, Europe and Japan. While most of the television sets are still manufactured in Hilversum, the Netherlands, the new line of Internet products has been developed and manufactured in Grand Oaks, IL.

Philips - Magnavox's television products division has the second largest market share in USA, which is currently at an all-time high of 23%. It has also the highest revenue growth for the third consecutive year, exceeding \$80 billion in the North American market alone.

# # #

# THE BROCHURE

A brochure comprise six panels each of which has its own information objective. I'll explain the basic strategy for each of these panels in class


**TESTIMONIES**

“The best coffee I ever had...”  
Barack Obama  
*United States' President*

“Tres Bien!”  
François Fillon  
*France's Président du Conseil des Ministres*

“我喝過最好喝的茶”  
Hu Jintao  
*China's President*

“We are Screwed”  
Howard Schultz  
*The CEO of Starbucks*




**THE DAILY GRIND CAFE**  
FOSTER SCHOOL OF BUSINESS  
UNIVERSITY OF WASHINGTON  
SEATTLE, WA 98105

FOSTER SCHOOL OF BUSINESS'

**THE DAILY GRIND**

“SERVING ONLY THE BEST QUALITY COFFEE AND TEA FROM ALL AROUND THE WORLD SINCE 1998”



BANGKOK, BEIJING, CAPE TOWN, LONDON, SYDNEY, SEATTLE, NEW YORK, TOKYO, SEOUL, SINGAPORE, PARIS, LOS ANGELES, GENEVA

## THE COMPANY'S MISSION



THE DAILY GRIND'S  
HOUSE ICED COFFEE

The Daily Grind specializes in high quality coffees and teas along with **authentic French pastries** and other baked goods. The owners' goals are to provide food and beverage to the diverse University District population that focuses on high quality products and also to create a unique environment to create the best possible coffee experience for each customer.

The basic idea behind The Daily Grind is a **high-end**, two-story coffee shop and café that provides one floor that is conducive for people to meet and talk with one another, and another floor that is more geared toward allowing people to study, since the majority of patrons are expected to be students. It will be open on all days that The University of Washington is in session from 7:00 AM-9:00 PM.

The Daily Grind will use a combination of state of the art **clover brewers** along with high quality espresso machines to provide coffee to its customers, and it will import a wide variety of loose-leaf tea from multiple countries. Baked goods will be baked daily in the kitchen of the café (which is located in the basement) and will include things such as bagels, doughnuts, scones, and more. The first floor will contain primarily **cushioned arm-chairs** situated in a conversation-conducive manner, and the second floor will have more tables and standard chairs that will better allow students to study.



The local radio station, KEXP, has agreed to compile playlists specifically for our café to play during store hours.

## Featured Beverages

ROYAL NEPALESE GREEN TEA	\$2.99
MINT AND LEMON ICED TEA	\$3.99
IRISH BARRY'S TEA	\$2.99
VIETNAMESE CONDENSED MILK COFFEE	\$4.49
FRENCH CAFÉ AU LAIT	\$4.49
JAVA KOPI LUWAK BREWED	\$5.99
GUATEMALA ASOBAGRI CAPPUCCINO	\$3.49
AMERICAN'S FAVORITE DARK MOCHA	\$4.49

### The Daily Grind

The Daily Grind Café  
Foster School of Business  
University of Washington  
Seattle, WA 98195  
Phone: (206)-697-3433  
Fax: (425)-555-6755  
E-mail: [daily@thedaily-grind.com](mailto:daily@thedaily-grind.com)



## Some Pointers on Tone and Style

Different pieces in the press kit seek to achieve different objectives. Although the entire press kit has a promotional tool, some elements have more of a “tell” function, and others have more of a sell function.

The Release, for example, has a more formal, informative function. It should never use first and second person pronouns, contractions, and should have a neutral reportorial tone. It should not sound like a shoddy puff piece.

The Cover Letter is a persuasive request like others we've looked at this quarter. The more personal/ informal style rules governing letters and memos apply.

The Brochure is a sales tool, and it can use promotional language. The other secondary pieces can employ different style characteristics depending on the effect they are trying to have on the reader. Think about it; don't just go with whatever comes first to mind.

## 9. THE ORAL PRESENTATION

### HOW TO PREPARE *CONTENT* FOR THE BUSINESS PLAN PRESENTATION

1. Once you've gathered all the information for your part of the presentation, do a freewrite. The point of a freewrite is to let go and let the "flow" write for you. When you do it correctly, you get ideas you didn't think of before. You might think of metaphors or jokes, or you may have some insights into the material you've been working with you didn't have before.
2. After having completed the freewrite, you need to organize it. The key is to find three or four focus points, but rather than think of them as "topics", think of them as questions to be answered. This will help you to get out of the habit of information dumping. You're not trying to tell the audience everything you know, just enough to answer questions you think the audience will have about the issues you want to present.
3. Write out a second draft as if you're answering the questions you've identified in the previous step. Think about someone you know and imagine him or her as you're writing. If you can think about yourself writing what you would say to her in an imaginary conversation, fine. If it would be easier to think of your writing him an email answering a question he might have, that's fine, too. The main thing is that you have a person in mind and that all you're trying to do is answer a question, not tell him everything you know.
4. Set a deadline for everyone in your group to have completed step three. Then have a "content rehearsal." This means that everyone reads out the part he or she has written in the order you think you'll probably go with in your presentation. This is when you shape the content of the presentation as a group. You critique one another with the idea of making each part as good as it can be. Make suggestions for additions or cuts. If someone in your group is talking about how that's the way the Japanese do it, so that's the way we're going to do it," this is when you need to nip it in the bud.
5. When the group feels that it has the content of the presentation in pretty good shape, each speaker needs to learn his or her part. If you have a good text to work with that is focused toward answering questions rather than just dumping information, it will be a lot easier to learn and to develop confidence in your ability to know what you want to say and to deliver it effectively. Create a storyboard (or use cards, if you must), and make it a practical tool to help keep you on track. Make adjustments on it as you proceed with your private rehearsals.



6. Ideally you should have two “delivery rehearsals,” the first to work out the major bugs the second to fine-tuning and polishing. See the Delivery page for tips on how to prepare your delivery. The first rehearsal is also when you should make sure that you have adequate well-executed visual aids, and each speaker should make his or her presentation using the visual aids for his or her part. This is first rehearsal is where you figure out where the problems are and you fix them, and fixing them might require doing work after the rehearsal. When you have your second delivery rehearsal, everything should be in place and at the end of it, you should feel that you’re ready to go.

### **Business Plan Presentation Structure**

#### Opening

- Get investors' attention; focus on their needs, interests, and concerns.
- Introduce business in general terms: orient the audience
- Give a preview; introduce management team
- Contract?

#### Body

1. Details about Problem
  - Market need: Who makes up prospective market? Who is your competition? What will you do differently or better?
2. Details about Solution
  - Operations/Product Service Description: How does your business solve the problem defined in the market need section? Make this part vivid and compelling.
3. Promotional Plans
  - How do people with the problem find out you have the solution?
  - Focus on strategic thinking rather than laundry list of tactics.
4. Financials
  - Prove your business will make money:
  - When will it break even, ie, when will revenues exceed expenses?
5. Offer to Investors
  - Make it interesting; meet their needs; show how you're the

solution to their problem of finding a good investment opportunity

Close

1. Ask for the money
2. Get them excited about their becoming a part of your company's future

## PREPARING AND USING VISUAL AIDS IN ORAL PRESENTATIONS

Some general principles:

**Be Visual, Not Verbal:** Visual Aids are meant to be *visual*, so put up slides about things that work well visually. That means minimize text to a brief phrase here or there, titles, and captions. Instead of overusing text charts, look for opportunities to use photos, diagrams, charts, illustrations, video clips.

**Interact:** Your VAs should not just be changing background scenery. If a slide is on the screen, you should be talking about it. If you've stopped talking about it, it should be off the screen. Move back to the screen, and especially with slides that are more complicated, go back to the screen with a pointer and walk your audience through the elements so they don't make the attempt to figure out what it means while you're talking about something else.

**Use the Four Criteria:** When you create bar, pie, line, or any other charts that summarize data, remember to use the four criteria.

1. Does your image have a compelling "visual story"? A chart is a picture, and the picture in itself has to convey meaning. Don't use a chart if there's nothing visually compelling about the information you want to talk about—use a table instead. Be aware of how your choices might be sending unintended messages.
2. Does it make an emphatic point about an issue that is an important part of your presentation? Your charts should be about subjects that are worth your audience's time and attention; they shouldn't be merely ornamental. They should work effectively to support the thrust of what you want to say.
3. Is it simple and easy to understand? The audience should not have to spend even ten seconds looking at your VA trying to figure out what it means.
4. Does it effectively summarize the information you want the audience to understand?

**Rehearse with Your VA Equipment:** Don't let the day of the presentation be the first day people in the group use the equipment. Use rehearsal time to make sure everyone is comfortable with the technology. If during the presentation one person in the group has a problem, another group member should help him or her out.

## TIPS ON WORKING WITH CHARTS

Problem: Complex information presented in reports tends to wash over readers:

- Charts tell a story visually.
- Charts emphasize points that the reader might otherwise pass over.
- Charts simplify points by creating images that tell a story in a flash.
- Charts summarize data relationships in a way that is quick and easy to grasp.

Problem: Visual aids are meant to supplement the text to make it easier and quicker to understand, but frequently they make the report more complex looking and force the reader to puzzle over a chart's meaning.

- Keep charts simple. Ask yourself if you are just giving your reader more work or whether your chart is making your reader's job easier.

### HOW TO CREATE A CHART

1. Determine message first
2. Decide which points need visual support.
3. Create chart type: message title or topic title.
4. Determine chart type.

### EXECUTION TIPS

1. Keep it simple
  - 3 lines max in line chart

- 5-7 slices in a pie chart
  - 5-7 bars in bar chart
  - Avoid clutter
  - Don't make chart do too many things
2. Label each chart (Figure 1, Chart 3, Table 2, etc.) and cross reference in text (See figure 1).
  3. Ask yourself once again: Are these charts making my message clearer and easier to understand or are they just complicating things?

## HOW TO PREPARE YOUR DELIVERY

Once you have worked through your part with your group in the 'content rehearsal', you need to learn your part on your own to get ready for the first delivery rehearsal.

Remember that you should learn your part as if you were going to be speaking to a group of friends. Your task is not simply to give them information, but to communicate ideas or insights.

The key things to work on alone, and when you work with your group in rehearsal are:

**Audience Focus:** This means that you are "out there" with the audience. Some people are shyer than others about making eye contact with people they don't know well, but it's important for your audience to know it is the center of gravity, that your goal is to communicate with them.

**Projection:** This is related to the audience focus and enhances your ability to be "out there." The goal here is take control of the room with your personal presence. You're not doing this if your voice can't be heard. You're not doing this if you're body language is stiff and your voice monotone. You have to have an appropriate degree of intensity in order to project effectively. You need to have a sense of mission about your message. It's the difference between a river running in spring when its fast and full or in summer when it's dry and slow.

**Expressiveness:** Speakers who are expressive use their voice and their body language to shape their ideas. They speak loud or soft, fast or slow in a natural spontaneous way that helps the audience to know what's important and what's just background information. A very important technique to learn is not to speak as if every word you say has the same value. Some ideas are more important than others, and that should be reflected by the non-verbals, such as voice intonation, facial expression, hand gesture, etc

**Fluency:** The opposite of fluency is a choppy, halting delivery and garbled, overly convoluted syntax in the sentence you speak. You should attain an easy-going pace that gives the audience time to assimilate what you have to say and which varies according to what is appropriate in terms of the expressiveness you're trying to achieve at any given moment in your presentation. It's ok to stumble here and there. It's ok to let slip an "um" or "uh" or some other filler word. But have your group give you feedback about whether you do it too frequently.

## 10. APPENDIX 1

### Paragraph Revisions from p. 32

#### Prewriting objectives

- Define your purpose.
- Define audience and its needs.
- Organize your secondary ideas around your primary.

#### Second paragraph:

#### Drafting objectives

- Use simple words.
- Use short sentences.
- Use strong verbs.

#### First Revision:

Before you start drafting, analyze the situation and develop a strategy. First be clear about your purposes. What specific results do you want from this message? Second, be clear about who your audience is and what its needs are. Third, develop an organizational strategy. Know which are your key points and cluster the others around them.

When you are ready to draft, remember your central objective is to make yourself understood. Use simple words. Avoid jargon and vocabulary that your audience is unlikely to understand. Write sentences that average twenty words or fewer. Use strong verbs avoiding the overuse of "to be" and its compounds, and avoid the passive voice except when it is politically expedient to do so.

Second Revision:

### **Prewriting Objectives and Tasks**

Before you start drafting, analyze the situation and develop a strategy.

1. Be clear about your purposes. What specific results do you want from this message?
2. Be clear about who your audience is and what its needs are.
3. Develop an organizational strategy. Know which are your key points and cluster the others around them.

### **Drafting Objectives**

When you are read to draft, remember your central objective is to make yourself understood.

- Use simple words. Avoid jargon and vocabulary that your audience is unlikely to understand.
- Use short sentences. They should average twenty words or fewer.
- Use strong verbs. Avoid the overuse of "to be" and its compounds, and avoid the passive voice except when it is politically expedient.

OR

**Prewriting Objectives and Tasks.** Before you start drafting, analyze the situation and develop a strategy.

1. Be clear about your purposes. What specific results do you want from this message?
2. Be clear about who your audience is and what its needs are.
3. Develop an organizational strategy. Know which are your key points and cluster the others around them.

**Drafting Objectives.** When you are read to draft, remember your central objective is to make yourself understood.

- Use simple words. Avoid jargon and vocabulary that your audience is unlikely to understand.
- Use short sentences. They should average twenty words or fewer.
- Use strong verbs. Avoid the overuse of "to be" and its compounds, and avoid the passive voice except when it is politically expedient.



## 11. APPENDIX 2

## Letters/Memos: Summary of Objectives

	Informative	Request
<b>Direct</b>	<u>Direct Informative</u>	<u>Direct Request</u>
Opening	<ul style="list-style-type: none"> <li>Set the table.               <ul style="list-style-type: none"> <li>-background, purpose (primary objective), preview (when using A-heads)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Background</li> <li>Purpose: establish request in general terms.</li> </ul>
Body	<ul style="list-style-type: none"> <li>Exposition using lists, tables, charts, and other tools</li> <li>Synthesis: connect the dots with summaries, conclusions, recommendations</li> </ul>	<ul style="list-style-type: none"> <li>Provide clear, well-developed explanation of request.</li> <li>focus: highlighting &amp; tight, coherent paragraphs</li> </ul>
Close	<ul style="list-style-type: none"> <li>Response mechanism</li> <li>Secondary Objective.</li> </ul>	<ul style="list-style-type: none"> <li>Make specific action request.               <ul style="list-style-type: none"> <li>-State deadline and make it easy.</li> </ul> </li> </ul>
<b>Indirect</b>	<u>Bad News</u>	<u>Persuasive Requests</u>
Opening	<b>Top Bun</b> <ul style="list-style-type: none"> <li>Background:</li> <li>Buffer: Show consideration to promote good will. Minimize damage to the relationship.</li> </ul>	<ul style="list-style-type: none"> <li>Establish common ground: Create a receptive space.</li> <li>Establish problem in general terms.</li> </ul>
Body	<b>Cheese</b> <ul style="list-style-type: none"> <li>Develop clear reasons.               <ul style="list-style-type: none"> <li>-Make reader see it from your point of view.</li> </ul> </li> </ul> <b>Meat</b> <ul style="list-style-type: none"> <li>Be clear, firm, and gracious in stating the bad news.               <ul style="list-style-type: none"> <li>-But get in &amp; out quickly.</li> </ul> </li> <li>Suggest alternative solutions</li> </ul>	<ul style="list-style-type: none"> <li>Dramatize negative impact of <u>problem</u>.               <ul style="list-style-type: none"> <li>-Establish urgent need to act.</li> </ul> </li> <li>Show your <u>solution</u> is best.               <ul style="list-style-type: none"> <li>-Prove that it eliminates cause of motivating problem.</li> <li>-Prove that it is superior to other solutions.</li> <li>-Build credibility--has it worked elsewhere? Testimonials, endorsements?</li> <li>-Discuss secondary benefits</li> </ul> </li> </ul>
Close	<b>Bottom Bun:</b> Goodwill gesture <ul style="list-style-type: none"> <li>Bad news does not define the relationship. Future is open.</li> </ul>	<ul style="list-style-type: none"> <li>Make specific action request.               <ul style="list-style-type: none"> <li>-State deadline</li> <li>-Make it easy</li> </ul> </li> </ul>

