Planning Business Messages
Planning Business Messages

1. Three-Step Writing Process
2. Analyzing Your Situation
3. Profile Your Audience
4. Gather Information
5. Selecting the Medium
6. Organizing Information
7. Define Topic and Main Idea
8. Choosing Approaches

Group Formation
Washing Machines
Insurance Plan
Three-Step Writing Process

**Planning**
- Analyze Situation
- Gather Information
- Select Medium
- Get Organized

**Writing**
- Adapt to the Audience
- Compose the Message

**Completing**
- Revise
- Produce
- Proofread
- Distribute
Three-Step Writing Process

Planning
- Analyze the Situation: Define your purpose and develop an audience profile.
- Gather Information: Determine audience needs and obtain the information necessary to satisfy those needs.
- Select the Right Medium: Choose the best medium for delivering your message.
- Organize the Information: Define your main idea, limit your scope, select a direct or an indirect approach, and outline your content.

Writing
- Adapt to Your Audience: Be sensitive to audience needs with a “you” attitude, politeness, positive emphasis, and bias-free language. Build a strong relationship with your audience by establishing your credibility and projecting your company’s image. Control your style with a conversational tone, plain English, and appropriate voice.
- Compose the Message: Choose strong words that will help you create effective sentences and coherent paragraphs.

Completing
- Revise the Message: Evaluate content and review readability, then edit and rewrite for conciseness and clarity.
- Produce the Message: Use effective design elements and suitable layout for a clean, professional appearance.
- Proofread the Message: Review for errors in layout, spelling, and mechanics.
- Distribute the Message: Deliver your message using the chosen medium; make sure all documents and all relevant files are distributed successfully.
Optimize Your Time

Planning Messages 50%

Writing Messages 25%

Completing 25%

How much time for every step?
Analyze the Situation

Define Your Purpose

Profile Your Audience
Define Your Purpose

To determine the specific purpose, think of how the audience’s ideas or behaviour should be affected by the message.
## Define Your Purpose

<table>
<thead>
<tr>
<th>General</th>
<th>Specific</th>
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<tr>
<td>Inform</td>
<td>Outcomes</td>
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<tr>
<td>Persuade</td>
<td>Timing and Realism</td>
</tr>
<tr>
<td>Collaborate</td>
<td>Acceptability</td>
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</tbody>
</table>

- **General** purposes include Inform, Persuade, and Collaborate.
- **Specific** purposes include Outcomes, Timing and Realism, and Acceptability.
Define Your Purpose

Defer the message, or do not send it if:
1. Nothing will change as result.
2. Purpose is not realistic.
3. Timing is not right.
4. Purpose is not acceptable to organisation.
# Profile Your Audience

- **Primary Members**
- **Size and Location**
- **Composition**
### Profile Your Audience

<table>
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<tr>
<th>Knowledge Level</th>
<th>Expectations</th>
<th>Probable Reaction</th>
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Business Communication Today, 9e  
Chapter 4 - 11
Audience analysis notes

**Project:** A report recommending that we close down the on-site exercise facility and subsidize private memberships at local health clubs.

- **Primary audience:** Nicole Perazzo, vice president of operations, and her supervisory team.

- **Size and geographic distribution:** Nine managers total; Nicole and five of her staff are here on site; three other supervisors are based in Hong Kong.

- **Composition:** All have experience in operations management, but several are new to the company.

- **Level of understanding:** All will no doubt understand the financial considerations, but the newer managers may not understand the importance of the on-site exercise facility to many of our employees.

- **Expectations and preferences.** They’re expecting a firm recommendation, backed up with well-thought-out financial rationale and suggestions for communicating the bad news to employees. For a decision of this magnitude, a formal report is appropriate; email distribution is expected.

- **Probable reaction.** From one-on-one discussions, I know that several of the managers receiving this report are active users of the on-site facility and won’t welcome the suggestion that we should shut it down. However, some nonexercisers generally think it’s a luxury the company can’t afford. Audience reactions will range from highly positive to highly negative; the report should focus on overcoming the highly negative reactions since they’re the ones I need to convince.
Gather Information

Informal Methods

- Viewpoints of Others
- Company Documents and Reports
- Supervisors, Colleagues, and Customers
- Audience Input
Provide Information

- Accurate
- Ethical
- Pertinent
Selecting the Medium

Oral Media
Written Media
Visual Media
Electronic Media
Oral Communication

- Conversations
- Interviews
- Speeches
- Presentations
- Meetings
## Analysis of Oral Media

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
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<tr>
<td>• Immediate feedback</td>
<td>• Limited participation</td>
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<tr>
<td>• Ease of interaction</td>
<td>• May not be permanent</td>
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<tr>
<td>• Rich non-verbal cues</td>
<td>• Reduced control</td>
</tr>
<tr>
<td>• Emotional content</td>
<td>• No editing or revision</td>
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</tbody>
</table>
Written Communication

Memos
Letters
Reports
Proposals
## Analysis of Written Media

<table>
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<tr>
<th>Advantages</th>
<th>Disadvantages</th>
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<tbody>
<tr>
<td>• Planning and control</td>
<td>• Delayed feedback</td>
</tr>
<tr>
<td>• Permanent record</td>
<td>• Few nonverbal cues</td>
</tr>
<tr>
<td>• Audience reach</td>
<td>• Distribution issues</td>
</tr>
<tr>
<td>• Minimal distortion</td>
<td>• Preparation time</td>
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</tbody>
</table>

- Advantages:
  - Delayed feedback
  - Few nonverbal cues
  - Distribution issues
  - Preparation time

- Disadvantages:
  - Planning and control
  - Permanent record
  - Audience reach
  - Minimal distortion
Visual Communication

Charts
Graphs
Diagrams
Figure 4.4  Visual Media

In traditional business messages, visual elements usually support the text. However, in some instances, the message can be presented more effectively by reversing that relationship—basing the message on a dominant visual and using text to support that image.

Source: Used with permission of Supply Chain Simple.
## Analysis of Visual Media

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
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</thead>
<tbody>
<tr>
<td>Ease communication</td>
<td>Artistic skills</td>
</tr>
<tr>
<td>Reduce complexity</td>
<td>Preparation time</td>
</tr>
<tr>
<td>Expedite understanding</td>
<td>Technical requirements</td>
</tr>
<tr>
<td>Assist the audience</td>
<td>Transmitting and storing</td>
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</table>
Electronic Communication

Oral Communication

Written Communication

Visual Communication
### Analysis of Electronic Media

<table>
<thead>
<tr>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery speed</td>
<td>Easy to overuse</td>
</tr>
<tr>
<td>Audience reach</td>
<td>Security threats</td>
</tr>
<tr>
<td>Multimedia formats</td>
<td>Privacy concerns</td>
</tr>
<tr>
<td>Accessibility/openness</td>
<td>Productivity issues</td>
</tr>
</tbody>
</table>
Choosing the Right Media

A Continuum of Media Richness

- **Richer**
  - Multiple cues, Interactive, personalised
  - Face-to-Face, Multimedia, Virtual Reality
  - Custom Reports, Memos, Letters, Email, IM, Wikis, Blogs, Podcasts
  - Telephone, Teleconferences, Videotapes

- **Leaner**
  - Fewer cues, Not interactive, Impersonalised
  - Standard Reports, Webpages, Mass Media, Posters and Signs

- **Standard Reports, Webpages**
  - Mass Media, Posters and Signs

- **Telephone, Teleconferences, Videotapes**
  - Custom Reports, Memos, Letters, Email, IM, Wikis, Blogs, Podcasts

- **Face-to-Face, Multimedia, Virtual Reality**
  - Multiple cues, Interactive, personalised
Choosing the Right Media

- Sender Intentions
- Urgency and Cost
- Audience Preferences
- Message Formality
- Media Limitations
Organizing Information

- Get to the Point
- Omit Irrelevant Ideas
- Use Logical Groupings
- Include Necessary Data
Importance of Organization

- Promote Productivity
- Boost Understanding
- Increase Acceptance
- Save Audience Time
## Define Topic and Main Idea

<table>
<thead>
<tr>
<th>General Purpose</th>
<th>Specific Purpose</th>
<th>Topic</th>
<th>Main Idea</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Inform</td>
<td>Teach customer service department how to file insurance claims.</td>
<td>Insurance Claims</td>
<td>Proper filing of claims saves time and money.</td>
</tr>
<tr>
<td>To Persuade</td>
<td>Convince managers to increase spending on research and development.</td>
<td>R&amp;D Funding</td>
<td>Competitors outspend us on research and development.</td>
</tr>
<tr>
<td>To Collaborate</td>
<td>Solicit ideas for incentive plan that ties wages to profits.</td>
<td>Incentive Pay</td>
<td>Linking wages to profits motivates workers.</td>
</tr>
</tbody>
</table>
Generating Ideas

- Brainstorming
- Mind Mapping
- Storyteller’s Tour
- Journalistic Approach
- Question-Answer Chain
Sequencing Messages

Direct Approach
(Deductive - start with main idea)

Indirect Approach
(Inductive - build your case)

Audience Reaction
Message Length
Message Type
## Choosing the Approach

<table>
<thead>
<tr>
<th>Audience Reaction</th>
<th>Eager/Interested/ Pleased/Neutral</th>
<th>Displeased</th>
<th>Uninterested/Unwilling</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Opening</td>
<td>Main idea, good news, or request</td>
<td>Neutral buffer statement</td>
<td>Attention-getting statement/question</td>
</tr>
<tr>
<td>Message Body</td>
<td>Necessary details</td>
<td>Reasons/justification, bad news, positive suggestion</td>
<td>Arousing interest, building desire</td>
</tr>
<tr>
<td>Message Closing</td>
<td>Cordial comment or statement about specific action</td>
<td>Cordial close</td>
<td>Request for action</td>
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</tbody>
</table>
# Outlining Content

<table>
<thead>
<tr>
<th>Alphanumeric</th>
<th>Decimal</th>
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<tbody>
<tr>
<td><strong>I. First Major Part</strong></td>
<td><strong>1.0 First Major Part</strong></td>
</tr>
<tr>
<td>A. First subpoint</td>
<td>1.1 First subpoint</td>
</tr>
<tr>
<td>B. Second subpoint</td>
<td>1.2 Second subpoint</td>
</tr>
<tr>
<td>1. Evidence</td>
<td>1.2.1 Evidence</td>
</tr>
<tr>
<td>2. Evidence</td>
<td>1.2.2 Evidence</td>
</tr>
<tr>
<td>C. Third subpoint</td>
<td>1.3 Third subpoint</td>
</tr>
<tr>
<td><strong>II. Second Major Point</strong></td>
<td><strong>2.0 Second Major Point</strong></td>
</tr>
<tr>
<td>A. First subpoint</td>
<td>2.1 First subpoint</td>
</tr>
<tr>
<td>B. Second subpoint</td>
<td>2.2 Second subpoint</td>
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</table>
Organization Chart Outlines

I. Major Point
   A. Evidence
   B. Evidence
   C. Evidence

II. Major Point
   A. Evidence
   B. Evidence
   C. Evidence

III. Major Point
   A. Evidence
   B. Evidence
   C. Evidence

The Main Idea
Basic Message Structure

State Main Idea

State Major Points

Provide Evidence
Checklist

Planning Business Messages

A. Analyze the situation.
   - Determine whether the purpose of your message is to inform, persuade, or collaborate.
   - Identify what you want your audience to think or do after receiving the message.
   - Make sure your purpose is worthwhile and realistic.
   - Make sure the time is right for your message.
   - Make sure your purpose is acceptable to your organization.
   - Identify the primary audience.
   - Determine the size and composition of your audience.
   - Estimate your audience’s level of understanding and probable reaction to your message.

B. Gather information.
   - Decide whether to use formal or informal techniques for gathering information.

C. Select the best medium for your message.
   - Understand the advantages and disadvantages of oral, written, visual, and electronic media.
   - Consider media richness, formality, media limitations, urgency, cost, and audience preference.

D. Organize your information.
   - Define your main idea.
   - Limit your scope.
   - Choose the direct or indirect approach.
   - Outline content by starting with the main idea, adding major points, and illustrating with evidence.
   - Look for opportunities to use storytelling to build audience interest.

- Find out what your audience needs to know.
- Provide all required information and make sure it’s accurate, ethical, and pertinent.
Six Types of Details

1. Facts and figures
2. Example or illustration
3. Description
4. Narration
5. Reference to authority
6. Visual aids
<table>
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<th>EXAMPLE</th>
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<tr>
<td>Sales are strong this month. We have two new contracts worth $5 million and a good chance of winning another worth $2.5 million.</td>
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</table>
We’ve spent four months trying to hire recent accounting graduates, but so far, only one person has joined our firm. One candidate told me that she would love to work for us, but she can get $5,000 more a year elsewhere.
### Description

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<td>Upscale hamburger restaurants target burger lovers who want more than the convenience and low prices of a McDonald’s. These places feature wine and beer, half-pound burgers, and generous side dishes (nachos, potato skins). “Atmosphere” is key.</td>
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Under former management, executives worked in blue jeans, meetings rarely started on time, and lunches ran long. When Jim Wilson became CEO, he completely overhauled the operation. A Harvard MBA who favors Brooks Brothers suits, Wilson has cut the product line in half and chopped $12 million off expenses.

Works well for attracting attention and explaining ideas, but lacks statistical validity.
I discussed this idea with Jackie Loman in the Chicago plant, and she was very supportive. As you know, Jackie has been in charge of that plant for the past six years. She is confident that we can speed up the number 2 line by 150 units an hour if we add another worker.
### Visual Aids

<table>
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<td>Graphs, charts, tables.</td>
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Journalistic Approach

• Who
• What
• When
• Where
• Why, and
• How
Mind-Mapping

• A mind map is a diagram used to represent words, ideas, tasks, or other items linked to and arranged around a central key word or idea.

• Mind maps are used to generate, visualize, structure, and classify ideas, and as an aid to studying and organizing information, solving problems, making decisions, and writing.
Mind-Mapping

- Are all the good sites taken in Dallas?
  - If any available, how expensive?
- Why does StarMarkets always get the best locations?
- Is Dallas market viable if we can’t get 10 good locations?
- Revenue potential at six sites leased so far?

Brainstorming:
Report on new store site analysis

- I don’t have time to write entire report
  - Complains about lack of detail in reports
- Writing issues
- Report distribution issues
- Highly confidential—can’t be e-mailed
- Can we present at board meeting?

- Audience concerns
- My concerns
- Convey my team’s contribution without looking like we’re boasting
  - Corrected financial assumptions
  - Streamlined broker selection process
- Site research still takes too long—how to explain?
# Groups Pattern

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Selling a Machine
Washing Machines

The purpose is . . .

- Participants practice thinking of creative solutions and looking at things from others’ perspectives
Washing Machines

Here’s How . . .

- Form groups of three to six.
- Each team has a free load of 10,000 used old washing machines.
- Think a way to market these machines and prepare a sales pitch (a 30 seconds commercial) for the rest of the group.
- You have 8 minutes to work.
- Every group will rate others on a scale of 10.
Questions

- How did your team arrive at the marketing design?
- How creative do you think you were? Why?
Questions

- What assumptions did you operate under?
Questions

- What assumptions did you operate under?
  - That it had to do with laundry,
  - That we must sell to consumers and not other businesses,
  - That we could paint or other-wise alter the machines from their original state, etc.
Questions

- How did those assumptions limit or expand your creativity?
- How did you identify features and benefits of your product? (Point out that this is where you have to focus on others’ needs.)
- What implication does this have for us back on the job?
Message for Analysis

A writer is working on an insurance information brochure and is having trouble grouping the ideas logically into an outline. Using the following information, prepare the outline, paying attention to the appropriate hierarchy of ideas. If necessary, rewrite phrases to make them all consistent.
Message for Analysis

- **Accident Protection Insurance Plan**
  - Coverage is only pennies a day
  - Benefit is $100,000 for accidental death on common carrier
  - Benefit is $100 a day for hospitalization as a result of motor vehicle or common carrier accident
  - Benefit is $20,000 for accidental death in motor vehicle accident
  - Individual coverage is only $17.85 per quarter; family coverage is just $26.85 per quarter.
  - No physical exam or health questions
  - Convenient payment—billed quarterly

- Guaranteed acceptance for all applicants
- No individual rate increases
- Free, no-obligation examination period
- Cash paid in addition to any other insurance carried
- Covers accidental death when riding as a fare-paying passenger on public transportation, including buses, trains, jets, ships, trolleys, subways, or any other common carrier
- Covers accidental death in motor vehicle accidents occurring while driving or riding in or on automobile, truck, camper, motor home, or nonmotorized bicycle