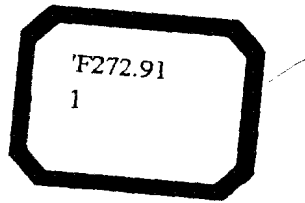# Managerial Communication Strategies

An Applied Casebook

Annette Veech

Managerial

Communication

Strategies:

An Applied Casebook

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This book is dedicated to people willing to pursue creative thought and positive team spirit.

Preface

First, let me explain how to differentiate this casebook from others in the arena of business and managerial communications. Many fine textbooks focus on specific business writing and presentation skills; those textbooks delve into areas of expertise such as rules of grammar and the tactical techniques necessary to build effective presentations. Writing and presentation skills are overviewed in this casebook because I believe that those skills are necessary prerequisites in managerial communications. This casebook, however, clearly does not compete with textbooks specifically designed to help professors teach business communication skills, but does serve as a complement to those textbooks.

Next, I must share my personal bias regarding effective managerial communication. I believe that a successful communicator/manager possesses two dimensions of skills: What I label the *science* and the *art* of communicating.

The first dimension, the *science* of effective communication, comprises such foundation skills as writing and speaking effectively, adhering to organizational style guidelines, staying on point (i.e., maintaining the central idea of a message), and succinctly delivering consistent messages. These foundation skills, the science, help formulate our perceptions of a manager's personal integrity and credibility.

The second dimension, the art of effective communication, incorporates such advanced and sometimes intuitive skills as reading the audience, separating facts from emotions, varying persuasive strategies to match others' personal styles, and applying group facilitation methods to solve team problems and identify the root causes of business issues. These skills, the art, lead to our perceptions regarding the extent to which we trust a manager.

I believe that competent managers excel in the science of effective communication. Through empirical evidence, I have come to believe that stellar managers excel in the science and the art of effective communication. Stellar managers consistently communicate effectively as well as mentally strategize in terms of their audience. These managers consider other points of view and seem to intuitively do the right things at the right times for the right people (and people perceive for the right reasons). Stellar managers go beyond doing the right things; stellar managers do things right.

These points lead me to explain why I organized this casebook around functional areas. Managers may have originally trained in a specific field (e.g., finance or marketing), but managers eventually must demonstrate some level of expertise across many fields (e.g., finance, marketing, human resources, and operations). The functional tasks,

however, recur on a daily basis. Therefore, I organized the casebook around critical functions to mirror the daily life of any manager.

Finally, some readers of more traditional business and managerial communications textbooks may feel that the clustering of cases is rather disparate. I defend this by saying that no manager has the luxury of responding to neat and tidy situations. The reality of a manager's life is that anything can happen, and unfortunately, often does. Therefore, my intent in gathering a range of cases is to present people with a continuum of realistic situations, based on composite facts—and my intent is to help managers think creatively and quickly.

I hope that this casebook helps managers and students of management capitalize on what they may already know (e.g., running brainstorms), creatively apply accepted business tools (e.g., SWOT Analysis) to what they perceive as communications issues, and consequently accomplish better results—with tasks *and* people. A manager perceived by colleagues as effective is probably viewed as a person with personal integrity and credibility, and, therefore, a manager whom people trust.

Acknowledgments

How to Use this Book

Purpose

This casebook is designed as a supplemental text to primary communication textbooks in university courses, workshops, and individual learning endeavors. The cases allow readers to analyze, draw conclusions, and recommend solutions.

A three-step problem-solving methodology is recommended in the casebook. In real life, every case is different; the people involved make judgment calls based on unique organizational and interpersonal contexts.

Therefore, any strategy in the casebook is not intended as the sole solution. Class discussions and the experiences of individuals lead to suggestions of numerous strategies. The ultimate benefit of the case approach is that someone always has a fresh idea.

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Manager as Communication Coach

Part One: Present for Impact

*Ask me to listen. But I'm more likely to hear you if you tell me
a persuasive story.*

A Story

"Vita" (not her real name) stands up to deliver a critical sales pitch. She is the manager supervising a capable cross-functional group of energetic people. Her team is pitted against three respected consulting companies; all four teams made the final cut to a

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"short list." The four consulting teams, in a pre-determined sequence, make their presentations today; Vita's team is third in the lineup. It is 2:00 P.M. and the executives from the client organization are tired: Their minds wander through their ever-accumulating lists of voice mails and e-mails.

Vita's team believes they'll win the project today; their costs are well within acceptable range, they enjoy a solid reputation in the industry, and their project management skills are impeccable.

Vita stands confidently. "Good afternoon, ladies and gentlemen. We are pleased to present our ideas to you this afternoon. We'll spend the next hour talking to you about our project management expertise, our track record in this industry, and our estimated costs and timelines for your project."

In contrast to Vita's belief, her first words could end the competition. Unless a dramatic event occurs (e.g., someone on Vita's team is friends with one of the client executives), Vita's team probably loses this bid before they finish their pitch for the business.

Why? Because Vita and her team forgot about two variables: *point of view* and *attention*. Smart managers focus on point of view and attention as they lead and manage their departments and teams; brilliant managers and salespeople extend that focus to external client relationships. Let's look at point of view first.

Whose Point of View Is Most Important?

Vita's team's point of view was not the most important in this scenario—the client's point of view was the most critical. Vita, as project manager and team leader, didn't realize that what her team sells isn't necessarily what clients buy. Vita tried to sell *expertise and process*; the clients wanted to buy *results for their organization*.

If the client executives weren't already convinced of Vita's team's project management expertise, their track record in the industry, and their realistic project costs and timelines, Vita's team would not have survived the final cut, but Vita missed that point entirely as she delivered the introduction to their sales presentation. Vita introduced her team's presentation by continuing to sell the very features already "conceptually" purchased by the clients. In addition, Vita ignored that, when buried in the mix of four competitive consulting teams, her team's presentation needed to stand apart from the rest in some unique way.

What do the clients really want to hear? They probably want to hear how Vita's team can help them meet *their* objectives—and how Vita's team will do it differently than other consulting teams. At this point, the clients are *curious*: "What can you tell me that I won't hear from your competition?" The clients want to buy *results* like improved sales, enhanced customer satisfaction, and better productivity. The clients only need project management expertise, a solid industry track record, and realistic project costs and timelines to help them reach their desired goals. Vita focused on her *reason for presenting* (i.e., presenters' purpose is "what we have to sell") as opposed to the *clients' reason for listening* (i.e., clients' objectives equate to " what we need").

How Is Attention Won?

The second variable that Vita missed was attention: Why should the executives start to listen to Vita and why should they continue to listen to her team? In other words, why should they care?

Make no mistake. The executives do care. They care about their organization's problems, their shortage of time every single day, and their resource issues. They don't care as much about Vita's *purpose* as Vita believes they do. Why? The answer is simple. The executives know why consulting teams traipse in, one after another: to sell something!

The executives do, however, care about whether Vita's team understands their objectives and needs. They care about hearing something new. And, they care about whether Vita's team *cares enough* about them!

There are two ways to prove all this to restless executives. First, Vita's team must think in terms of the *client's point of view* — they must speak in terms of the *client's objectives*, not the *consulting team's purpose* for speaking. Second, they must grab the *attention*, from the very beginning, of every single executive.

Think about what Vita, in essence, said: "Hi. Our purpose in speaking to you today is . . ." Does this capture the executives' attention from *their* point of view? No. Vita, in reality, gave the clients permission to wander mentally from her presentation before her team even began.

Is There a Solution?

What should Vita have done differently? First, she should have *understood the client's point of view*. If Vita's team had asked themselves six simple questions, they could have identified what the client wants to know:

- What will you do (e.g., can you give me a simple yet elegant solution)?
- Why are you the best (e.g., what makes your team so special)?
- When will you do it (also known as how fast)?
- Where will most of the work occur (e.g., how convenient will it be for me)?
- How much will it cost me (also known as how cheap)?
- Who will help me do it (e.g., will I like working with your team)?

Vita, from word one, should have spoken *for (and from) the client's point of view* to prove that she understood them. If she understood the client's point of view, Vita would first *capture* the executives' attention before she and her team tried to *maintain* it for the next hour. Her introduction (i.e., my purpose for speaking) is the most standard (and perhaps boring) in the history of presentations.

Vita should begin a presentation like this with an unusual introduction, and yet, this is no small task. Vita should have remembered that people are curious. Vita did not capitalize on the fact that *analogies* and *metaphors* pique curiosity and enhance persuasive points. The bottom line is that Vita didn't *tell a story*.

A Story Has a Point of View and a Story Captures Attention

People love stories. Stories coax us to read novels; stories cause us to watch the news; stories even find us looking for happy endings in the stock market reports. There is a story behind everything, and to capture the attention of an audience, we'd better tell a darn good story.

Storytelling is central to the work of many communications companies; clients pay significant sums of money to apply the art of storytelling to their business scenarios. Mr. Peter Giuliano, chairman of Executive Communications Group of Englewood, New

Jersey, was quoted in August 1999 in *The New York Times*: "It requires a high level of strategy. That's what differentiates executive storytelling from telling a story across the kitchen table—the strategic development and intent of the story."

Effective managers understand the value of effective storytelling and they realize that stories accomplish three outcomes with people; stories:

1. Enhance memory
2. Persuade opinions
3. Motivate action

Every manager struggles daily with how best to motivate diverse employees. I ask that you consider the art of the story as one tactic. Let's look at a simple scenario.

You enrolled in an effective presentations class. You participate (even though you don't enjoy delivering presentations) for your own professional and personal reasons: (1) to reduce nervousness before presenting, (2) to speak more effectively, and (3) to persuade employees more efficiently. Your reasons are not exactly the same as the guy or gal sitting next to you in class. Given this scenario, review the following table listing three sample introductions. Which of the introductions in Table 1-1 would you *care* about?

A simple metaphor often paves the way toward a good story because it allows people to visualize their own points of view and because the metaphor captures attention. But as any experienced speaker understands, there is much more to delivering an effective presentation than the introduction.

You Remember What You See

Did you know that the first thing an audience focuses on is *visual*? An audience remembers *what you and your visuals look like* more than they recall *what you've said*. That's a rather scary thought, since we spend so much time deciding what to say to an audience. The truth is, if you and your audiovisuals distract the audience (i.e., if you pace too much, if your slides contain excessive graphics or words), then the audience recalls fewer of your topical points. An audience focuses:

1. First, on the *visual* presentation—you, your visual aids, and basically, anything that moves in the near environment.
2. Second, on *how* you speak—your inflection, pace, tone, and use of pauses.
3. Third, on *what* you say—the words that you think are so important.

Robert A. Brawer, author of *Fictions in Business* and former CEO of Maidenform, tells a story that clearly illustrates our initial focus on the visual. An acquaintance asked Mr. Brawer to have lunch with a Wall Street firm managing partner. Mr. Brawer reluctantly attended; he recounts his memory of that occasion:

> "I remember very little of what he said . . . or about how much money it [the company] had made . . . Strangely enough, what I do remember—and that most vividly—is comparatively insignificant. There was [on the Wall Street partner's shirt] a pair of weighty, elegant cufflinks in hammered gold on meticulously turned, striped French cuffs." (*Fictions in Business*, p. 43)

TABLE 1-1 Sample Presentation Introductions

Sample Introductions	*Why You'd Care (or Wouldn't)*
Sample 1 Good morning. My name is Carl and I'm going to talk to you about how to deliver effective presentations.	Okay, so you wouldn't care about this one much. The speaker using this introduction has only stated the obvious.
Sample 2 "People listen with 25 percent efficiency. Information usually needs to be sent three times to people in order to be received and processed, because people distort 40 to 60 percent of what they hear." That's a quote from Claudyne Wilder, author of a great book entitled *The Presentations Kit* (New York: John Wiley & Sons, Inc., 1994, vii).	You might smirk and say you're reminded of your spouse, children, or a friend. Or you may recall an employee who rarely follows directions correctly. The speaker using this introduction offers people a chance to compare the statistics to their personal experiences.
Sample 3 Have you heard of the Sarah Winchester House in California? The heiress to the Winchester rifle fortune, Sarah, owned the house. Sarah believed that if she constantly remodeled and added on to the house, she'd never die! She hired people to work on that house every day of the week until she, of course, died. The result? A house with stairways leading to brick walls, windows opening into other interior rooms, and a labyrinth of confused rooms and hallways. The house is now open to tours. If you don't have a well-crafted presentation, you may well wind up with a speech like the Sarah Winchester House. Your presentation won't have a clear path from the beginning, the middle, and to the end. Your audience will be confused and perhaps aggravated because they don't know where you're taking them.	Did the story capture your attention? Did it tap into your curiosity about the absurd? Did the metaphor between *house* and *presentation* draw a memorable parallel for you? For many audience members, the answer is "Yes." The speaker using this introduction helps people get caught up in the story so that they create mental visuals of the house. With these visuals in mind, people can more readily envision the need for crafting the foundation of an effective presentation.

Practically speaking, it is not so strange that the foremost item in Mr. Brawer's memory was cuff links, as opposed to the lunch discussion. Managers would do well to remember this when delivering a presentation or coaching their employees: If you're not careful, visual messages overtake the verbal messages.

Let's move from the importance of the visual to how to analyze the *overall context* of a presentation. Table 1-2 outlines tips for understanding your audience and organizing your presentation.

TABLE 1-2 Basic Presentation Strategies

Analyze	• Your audience, the facilities, the context. Don't underestimate the power of any of these variables.
Identify	• Your purpose: the *what* of your presentation. • Your audience's objective(s): *why* they should listen.
Focus on the Central Idea	• Stated in one memorable phrase or sentence. • To explain the intended benefit(s). • As a "conceptual thread" to integrate all topical points of your presentation.
Create an Interesting Introduction	• To motivate; create interest or curiosity. • That avoids an apology or standard joke. • By starting with a question or quotation. • By using a "dimensional prop." • By clearly stating your central idea. • By previewing the "big picture" of key topical points.
Back up Your Words (Evidence)	• By sharing your personal experiences. • By using analogies or metaphors. • By including the judgment of experts. • By describing examples from other organizations. • By stating statistics or facts.
End with a Powerful Conclusion	• By summarizing key arguments or topical points. • By restating the relevance of your central idea. • By visualizing the benefits. • By urging the audience to take action. • With words like, "in conclusion" or "to summarize" (to ensure that the audience takes note of your final words).
General Tips	• Use the old adage, "Tell them what you're going to tell them; tell them; and, finally, tell them what you told them." • Move from general to specific. • Sequence from large-scale to small-scale ideas. • State the long-term picture and quickly remind the audience of immediate benefits. • Label or enumerate key topical points or sequential steps (to verbally "mark" the listener's place).
Visual Aid Pointers	• People recall more through visual reminders, as opposed to verbal clues only. • Use no more than six (6) bullets on each slide. • Confine a single major idea to one visual slide. • Do not read the slides to your audience; paraphrase and discuss the concepts. • Stand to the left of visuals; don't block any person's view (from any room angle).
Handling Questions & Answers	• Listen to the question; paraphrase so the entire audience hears the question. • If you don't understand the question, ask the person to rephrase. • Ask probing questions when needed.

TABLE 1-2 *(continued)*

- Respond to an "objection" question with a generally acceptable point and then answer (e.g., "While most of us agree that quality has improved; yes, our costs jumped 10 percent."
- With an "objection" question, always state your empathy with their area of concern.
- Give a concise answer, look away from the person who asked the question, and move on to another person's question.
- If you can't handle an issue at the time, write it on a flip chart and tell the audience that you'll get back to them later with the answer.

These basic presentation strategies were probably not all that new for many readers; perhaps they provided a useful reminder, however. Let's now review *five common elements* of effective presentations:

1. Start with an interesting introduction and a memorable central idea.
2. Differentiate your purpose for speaking from the audience's objectives for listening.
3. Explain the big picture of what you are about to say (e.g., similar to a table of contents).
4. Speak in a logical flow and support what you say (i.e., evidence).
5. Conclude powerfully by repeating the central idea and highlighting the benefits.

Tables 1-3, 1-4, and 1-5 are based on the five key elements of effective presentations and provide a structure for evaluating your presentations and formulating basic presentation outlines. Table 1-4 contains the basic script for a brief talk about mistakes made by teams when preparing presentations. The *hunter/farmer* to *explorer/settler* metaphor in the sample originated with a brilliant team of students as they worked with a client in our classroom.

Part Two: Write for Results

Stories are a company's parables of truth. Anecdotal stories are often more powerful than an organization's official written documents.

What You Read Versus What You Believe

Early on, every employee learns to differentiate between the *written version* and the *unwritten reality* of a policy, procedure, or performance standard. The written version describes how things *should* happen; the unwritten version recounts what is *allowed* to happen. Too often, people disbelieve official written words produced within their organizations.