McKinsey
Academy

CFI:
Key Takeaways

Communicating for Impact
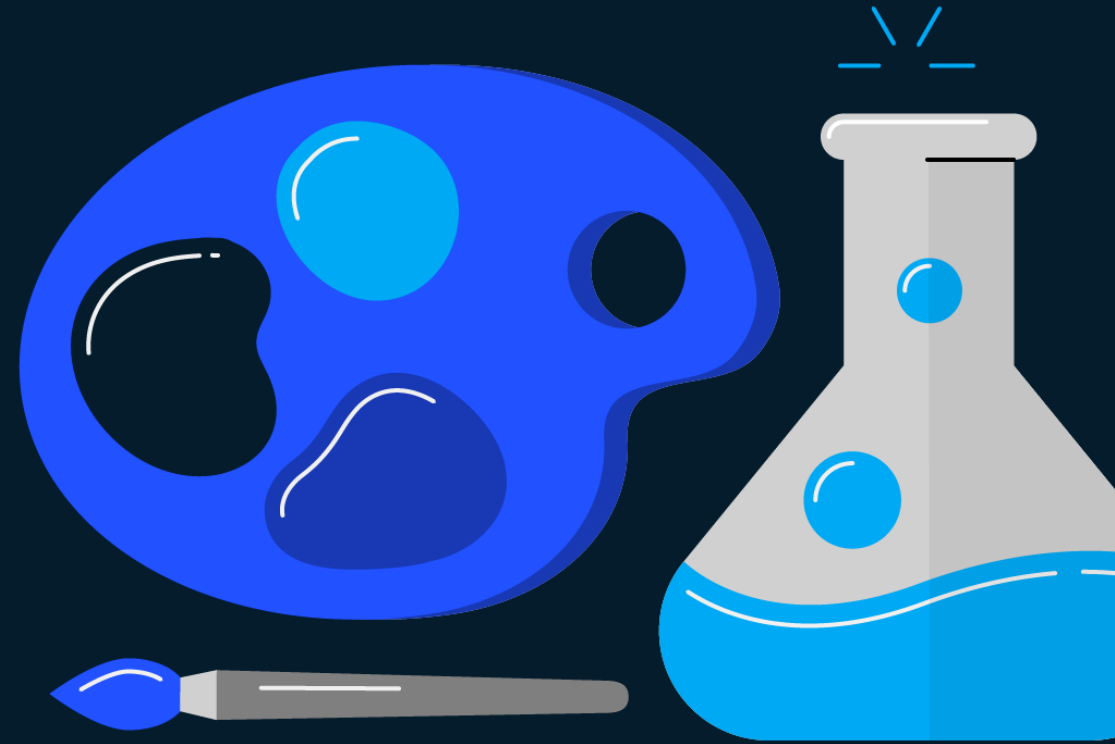
Contents

Section 1 - Introduction: Key takeaways

McKinsey & Company

Key takeaways
Core content

What is EPIC?

- EPIC is a holistic approach to communication that is **applicable to a wide range of interactions**
- The four elements that make up the EPIC framework are **Empathy, Purpose, Insight, and Conversation**

Why is EPIC important?

- To deliver **change that matters** to your audience, it is not enough to simply bring great ideas and insights
- EPIC helps to communicate those ideas in a way that **inspires people to act** and to implement meaningful change

How do I apply EPIC?

Leverage the following tools and/or techniques to master EPIC:

- EPIC worksheet

What will I learn in this course?
Core content

Empathy
Put yourself in the other person's shoes to understand their perspective

- Learn how to use the EPIC communications approach and how well-structured business communications can help you capture your audience's attention and move them to action
- Take the perspective of your audience in order to build a strong foundation for your communications

Purpose
Define the purpose to include their needs and yours

- Define the purpose behind your communications including the audience's needs and yours

Insight
Articulate your ideas in a clear and compelling way

- Structure your ideas into a clear and compelling message supported by insights and facts
- Use synthesis instead of summary to draw out the insight you want to share—the insight that brings value to the conversation
- Bring your message to life through storylining and visualizations

Conversation
Plan and orchestrate the flow of an effective two-way conversation

- Employ powerful rhetorical and storytelling techniques to build an emotional and memorable connection with your audience
- Practice techniques to deliver your message with style and presence that increase the impact of your communication
- Learn how to facilitate productive group discussions that create a collaborative and inclusive environment

Each section of the course covers one of the **four elements of EPIC**

Leaders and communications experts will share personal stories, techniques, and tools to enable you to **develop your message** and **deliver it with style**

Communications goals at MODA
Core content

MODA character name and role	Communication goal
Aaliyah Williams Chief Transformation Officer	Learn how to craft and deliver a compelling story around change within MODA
Noah O'Sullivan Head of Digital	Learn how to more effectively tailor meetings to meet the needs of the audience
Maryam Khan Lead Analyst	Learn how to inspire action in others through email and presentations

EPIC guiding questions
Worksheet

		What questions do we ask ourselves?	**Write your answers here**
E	**Empathy** Put yourself in the other person's shoes to understand their perspective	How is the other person feeling about the topic? What's on their mind? What do they understand about the topic? What do they care about? What is at stake for the other person? Why is this important to them? How does that impact what's possible in this interaction?	
P	**Purpose** Define the purpose to include their needs and yours	What does the other person want to get out of the interaction? What do you want to get out of this interaction? What is the overall purpose of the project, and how does this interaction help move us towards it?	
I	**Insight** Articulate your ideas in a clear and compelling way	What insights are most relevant to helping you succeed in this purpose? What storyline will help you focus attention on those insights? What concise phrases capture your ideas best? What types of materials or interactions will help you share those insights most clearly?	
C	**Conversation** Plan and orchestrate the flow of an effective two-way conversation	How will you use questions and statements to spark the discussion? What questions might the other person have? How do you want the conversation to start and end (on a high note)? How do you want to deliver your message? How will you use the supporting materials and why?	

Contents

Connect with your audience:
Key takeaways

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& Company

Key takeaways
Core content

What is empathy?

- Empathy is the ability to **understand another person's experience, perspective,** and **feelings**
- Building a connection with your audience, especially during stressful times, can lead to **measurable positive outcomes** that benefit yourself, the audience, and your organization
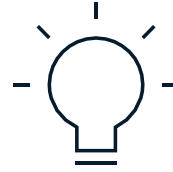
Why is empathy important?

- All effective communications begin with empathy
- Building a connection with your audience, especially during stressful times, can lead to measurable positive outcomes that benefit yourself, the audience, and the greater organization

How do I apply empathy?

Leverage the following tools and/or techniques to master empathy:

- "Over here," "over there"

- Active listening

- Inclusivity concepts

- Open ended questions

EPIC guiding questions
Worksheet

E **Empathy**
Put yourself in the other person's shoes to understand their perspective

What questions do we ask ourselves?

Write your answers here

How is the other person feeling about the topic? What's on their mind?

What do they understand about the topic? What do they care about?

What is at stake for the other person? Why is this important to them?

How does that impact what's possible in this interaction?

"Over there" mindset
Core content

"Over here" mindset
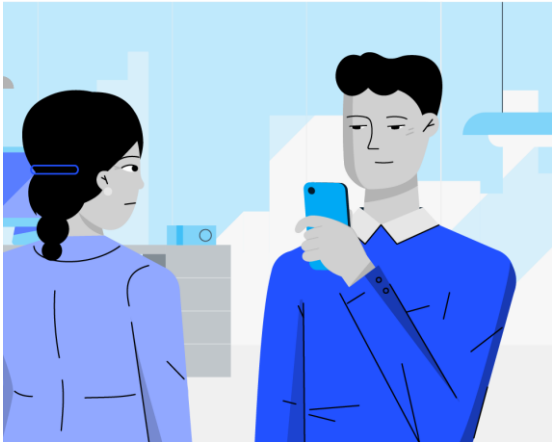
An "Over here" mindset is focused on oneself and is caught up in their own agenda

When someone is in an "over here" mindset they tend to be transaction-oriented, insular, and often hierarchical. They may be judgmental, distracted, and uninterested in the other person

"Over there" mindset

An "Over there" mindset is focused on the other person and the broader relationship

Your interaction is one of a counsellor. It is inclusive and collaborative with the other person. Remember—great communicators are attentive and curious. They take time to get to know people, ask questions, and listen

Active listening
Tips/techniques

Tactics for active listening	Description
Supporting and encouraging	• Encouraging – "Yes, I see," "of course," facial expressions (e.g., smiling), open body stance • Validating – "If I were in your situation, I'd feel the same way," nodding/shaking head • Imagining – "I can imagine it's frustrating for you"
Reflecting and repeating	• Summarizing – "So would it be right to say there are three main issues…," "It sounds like you're saying …" • Describing – "You seem upset by that," "It sounds like you felt angry with him"
Digging deeper	• Clarifying – "Why do you think that happened?" "Which of those issues came first?" • Open – "How are you feeling about the project?" "What's going on for you this week?"
Offering help	• Personal – "Is there anything I can do to help?" • Hypothetical – "What would you like to happen in an ideal world?" "How can we make that a reality?"

Contents

Orient toward an objective: Key takeaways

Key takeaways
Core content
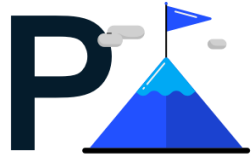
What is purpose?

- The aim of an interaction is **defined by the context** and has a **specific purpose** to meet your needs and the audience's
- There can be **several purposes for a conversation**, most which fall into one or more of the **Five Purpose Archetypes**
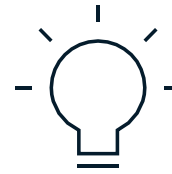
Why is purpose important?

- With each interaction, it's important to define a **shared purpose** between you and your audience
- Having a shared purpose **ensures that everyone is engaged** in the conversation and can ultimately **move to action** as a result

How do I apply purpose?

Leverage the following tools and/or techniques to master purpose:

- Purpose archetypes

- Heads, Hearts, and Hands

Orient toward an objective: EPIC guiding questions
Worksheet

Purpose
Define the purpose to include their needs and yours

What questions do we ask ourselves?	Write your answers here
What does the other person want to get out of the interaction?	
What do you want to get out of this interaction?	
What is the overall purpose of the project, and how does this interaction help move us towards it?	

Purpose archetypes
Framework

The purpose of an interaction should be as specific as possible, but it may fall into one of five common archetypes

Purpose archetype		Description
1	Understanding	Ensuring that everyone involved understands and is aligned with the work that we have been asked to do
2	Gathering and developing information and ideas	Creating a picture of the situation and facilitating problem solving
3	Rapport building	Actively listening, learning about concerns and motivations, and building a relationship
4	Reassurance	Building confidence in the project and the insights being developed
5	Decision making	Providing the insight and space for everyone to make an informed decision on a specific topic

Heads, Hearts, and Hands

Illustrative example

	Deliverables	What do you want your audience to understand?	How do you want your audience to feel?	What do you want your audience to do?
Project kick-off	• Scope of project • Proposed workplan • Deadlines and deliverables	• Your approach and workplan • Help, information, support you need from them • How the scope of the project is defined	• Valued • Confident in the approach • Willing to contribute	• Validate and/or modify the approach • Answer questions • Spot missing deliverables • Add nuance and detail to the thinking
Progress review 1	• Analysis, data • Synthesis of pain points/ blockers	• The analyses completed and their implications (the "so whats") • Pain points requiring further action	• Well informed • Engaged • Valued	• Ask questions • Dig into/immerse themselves in the findings
Progress review 2	• Initial solutions and recommendations • Initial list of enablers and barriers for solutions	• Trade-offs involved in solutions and recommendations	• Willing to contribute • Respected	• Generate additional ideas • Test the recommendations • Advise on barriers, enablers
Final progress review	• Prioritized recommendations • Detailed implementation roadmap	• Vision for the future • Understand their role in the change vision	• Trust • Confidence in the implementation plan	• Agree and reach consensus • Modify the implementation plan

Heads, Hearts, and Hands
Worksheet

	Deliverables	What do you want your audience to understand?	How do you want your audience to feel?	What do you want your audience to do?
Meeting 1:				
Meeting 2:				
Meeting 3:				
Meeting 4:				

Contents

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Structure your argument:
Key takeaways

Key takeaways
Core content
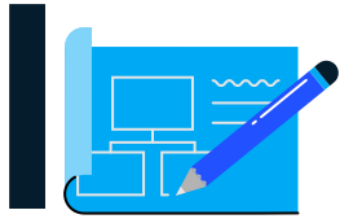
What is insight?

- Insights are generated by analyzing information and drawing conclusions

- **Grouping and synthesizing like facts and insights** help to form the foundation of your argument or message

- The **Pyramid Principle and storylining** provide an approach to developing structured arguments

Why is structuring my argument important?

- It's not enough to have the facts; you need to **form them into a coherent message**

- In a business context, your ability to move an audience to action largely depends on your ability to **structure a logical argument** and **craft a compelling narrative**

How do I apply structuring my argument?

- Leverage the following tools and/or techniques to master structuring your argument:

  — Pyramid Principle

  — MECE grouping

  — Summary vs. Synthesis

EPIC guiding questions
Worksheet
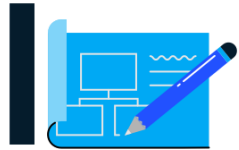
Insight
Articulate your ideas in a clear and compelling way

What questions do we ask ourselves?	**Write your answers here**
What insights are most relevant to helping you succeed in this purpose?	
What storyline will help you focus attention on those insights? What concise phrases capture your ideas best?	
What types of materials or interactions will help you share those insights most clearly?	

Pyramid Principle
Framework

What should the pyramid contain?

- A single governing thought which is the key takeaway the audience must hear during the first 2 minutes of your communication event

- 3-5 key line statements that act as the underlying arguments that support the governing thought

- 3-5 supporting facts per key line statement which build the foundation of your pyramid and support both the key line statements and the governing thought

How to get started building your pyramid

Step 1: Begin by reviewing the facts you have collected and create logical fact groupings

Step 2: Strive to create groupings that have no gaps or overlaps. That is, they are

- *Mutually exclusive*: The groups address unique issues with no overlap

- *Collectively exhaustive*: As a set, the groups represent the spectrum of issues at play, leaving no gaps

Step 3: Write a key line statement to synthesize each logical fact grouping

Step 4: Write a governing thought to synthesize the key line statements
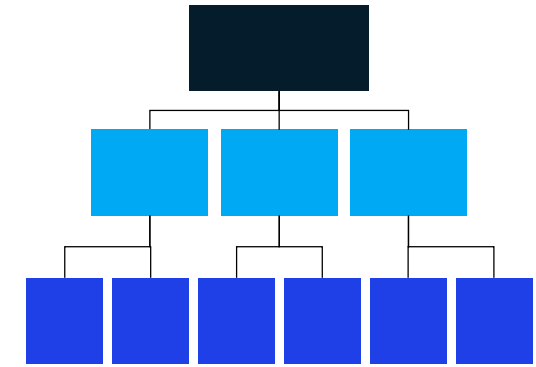
Governing thought: The one-sentence answer or solution to a problem

Key line statements: The why and how to implement the solution

Supporting data: The supporting evidence

Building a pyramid bottom up
Framework
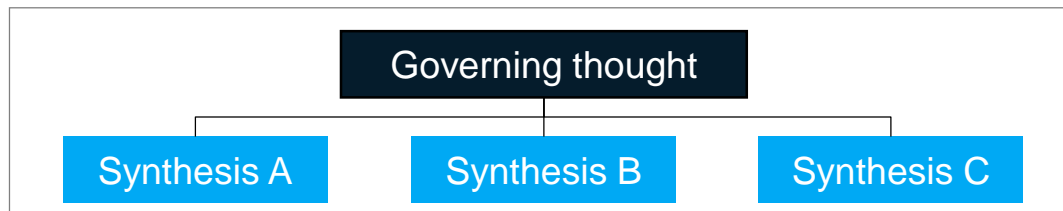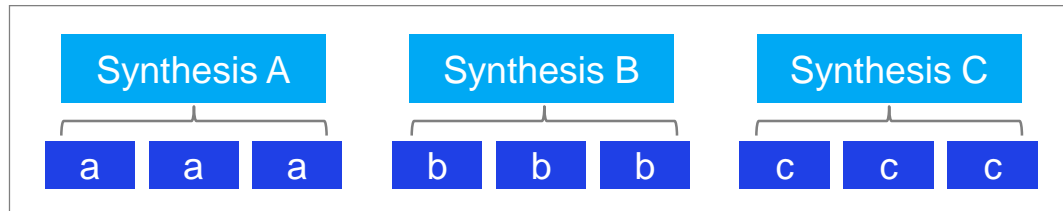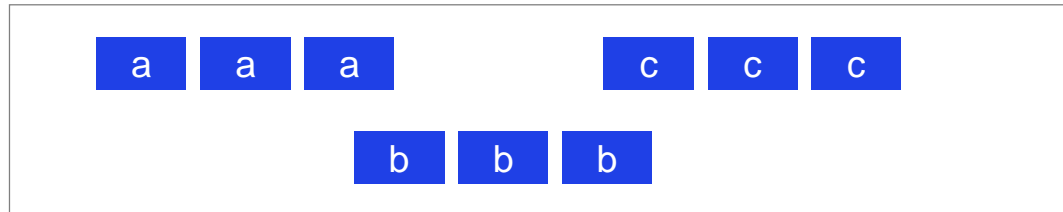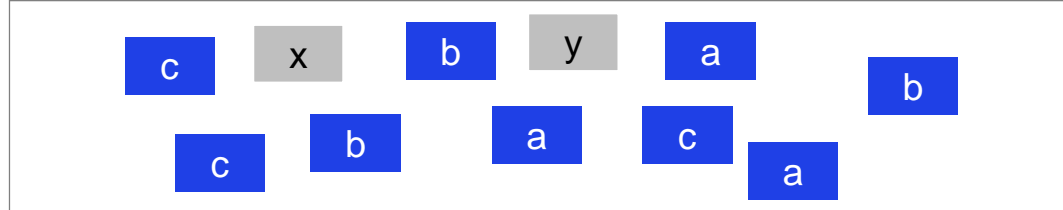
1. Lay out your findings on a table, floor, wall, or white board. Express your findings as dynamic assertions (e.g., complete ideas with verbs), not as static labels (such as topics)

2. Look for patterns that lead you to group ideas, such as effects of a situation, observed facts, examples, reasons, benefits

3. Write a statement that synthesizes each group of ideas. Express each synthesis as a dynamic assertion

4. Provide an overall synthesis. Ask: what does each synthesis imply for the question at hand, or for the next steps? This top synthesis becomes the governing thought of your storyline

Pyramid Principle diagram
Framework

Building a pyramid **top down** answers how or why

Building a pyramid **bottom up** answers, "so what?"

Groupings should follow a **logical order**, have no **gaps or overlaps**, and **synthesize** the level below
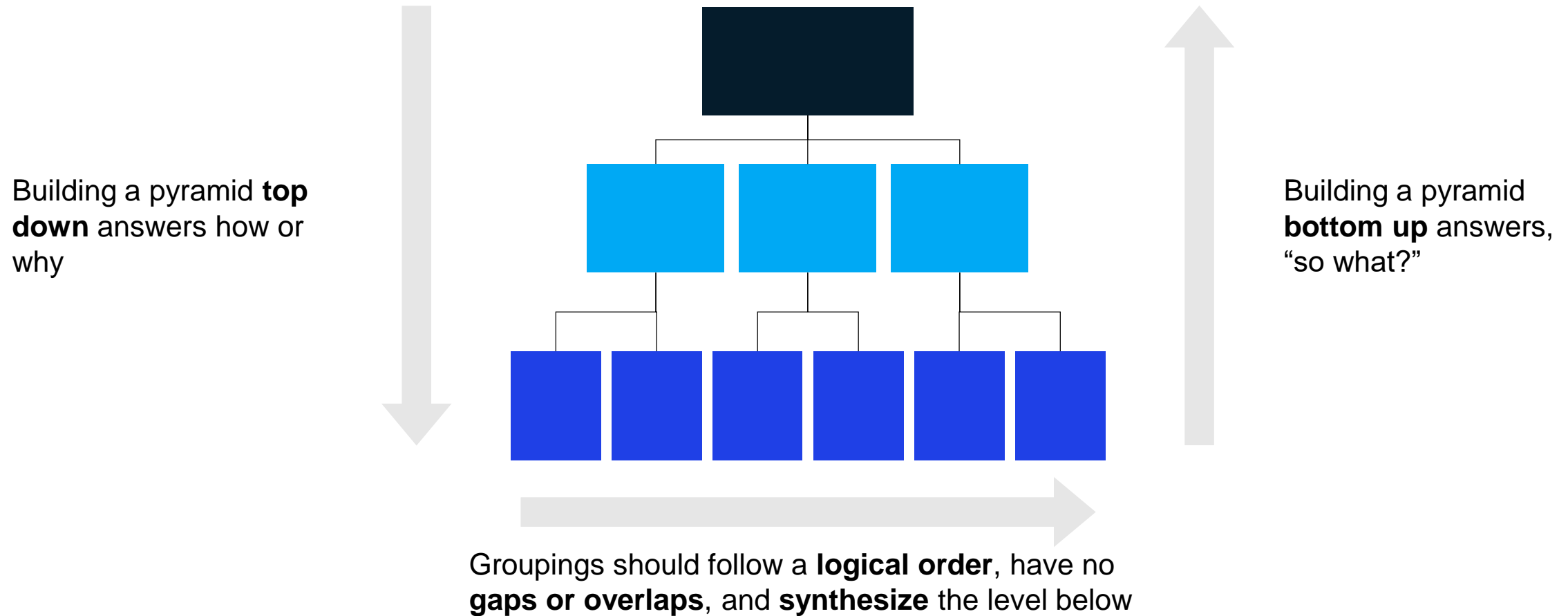
Pyramid Principle worksheet
Worksheet
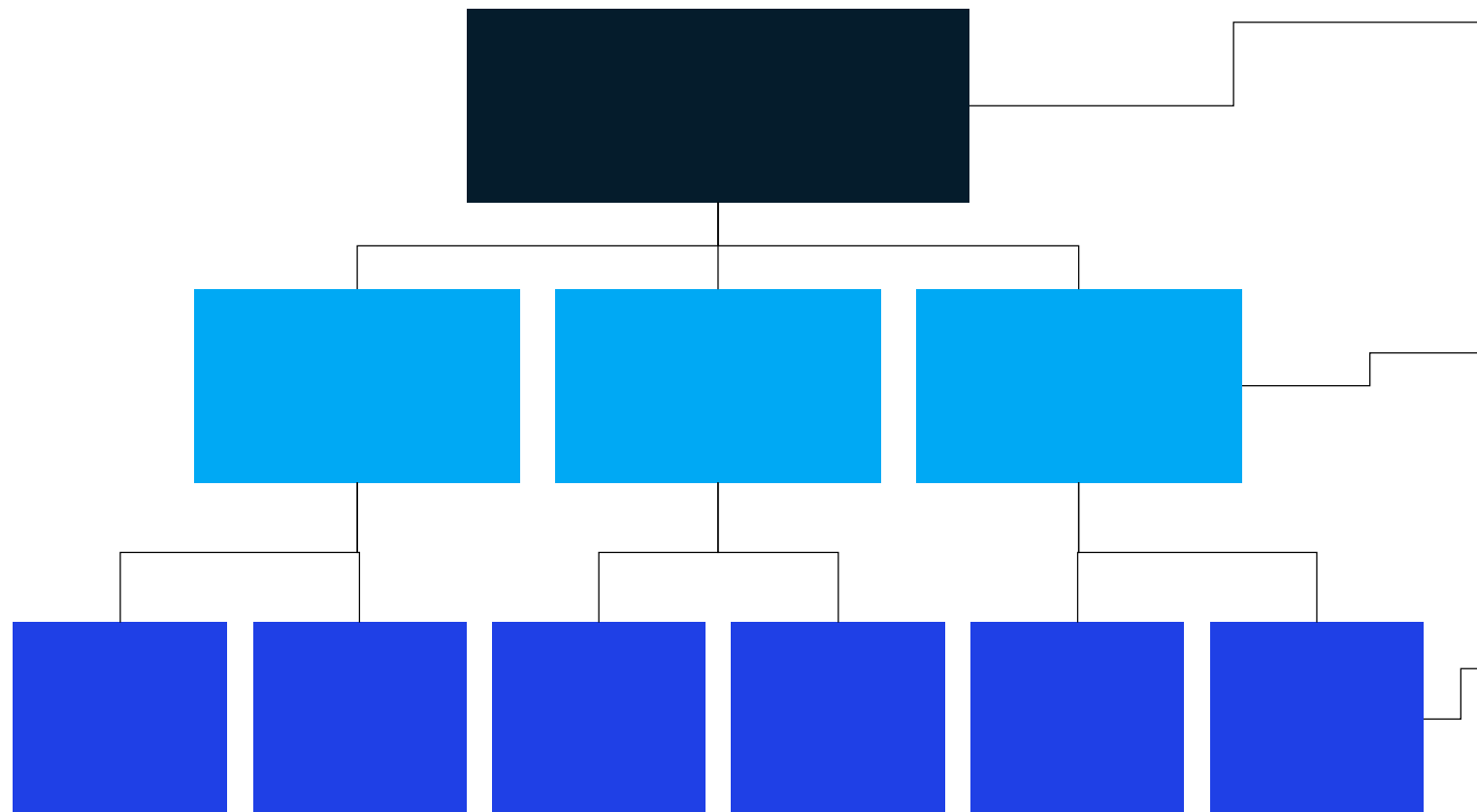
Governing thought
- Answers the central question, providing direction for a decision or action
- Makes an overarching point that is a synthesis, not a summary
- Is stated powerfully in short, sharp, plain language

Key line statements
- Underpins the governing thought with no gaps, no overlaps (MECE)
- Each point synthesizes the points beneath it
- Points are at the same level of abstraction and in a logical order
- In a grouping, ideas are of the same logical kind (e.g., reasons, causes, steps, parts)

Supporting data
- All data is relevant, sufficient, and fact-based
- Says enough about implications to enable decision making
- Items in each set are MECE

MECE Grouping
Tips/techniques

Most often, you deliver your message top down, but you build it bottom up:

- When you deliver your message, you lead with your governing thought and then share the analyses and facts that support it

- When you build your message, you do the opposite: you start by grouping the facts, and then you "boil them up" into a well-supported governing thought

A pyramid structure begins by **grouping like facts and ideas**. These groups form the foundation of your pyramid. When structuring arguments, there should be no gaps or overlaps in the groups of facts or arguments at each level. Another way to describe these groupings is that they should be **mutually exclusive and collectively exhaustive (MECE)**

Mutually exclusive means that groupings are independent of each other, such that there is no overlap of ideas. Furthermore, mutually exclusive ideas are at the same level of abstraction

Collectively exhaustive means that the groupings represent a full spectrum of ideas or options. Taken together, a set of collectively exhaustive statements describe the issue completely

Everybody loves candy

| Men love candy | Women love candy | Children love candy |
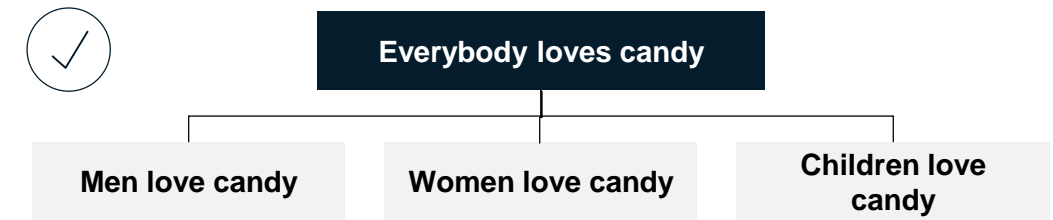
Can you see the difference?

Everybody loves candy

| Spanish speakers love candy | Elders love candy | Young people love candy |
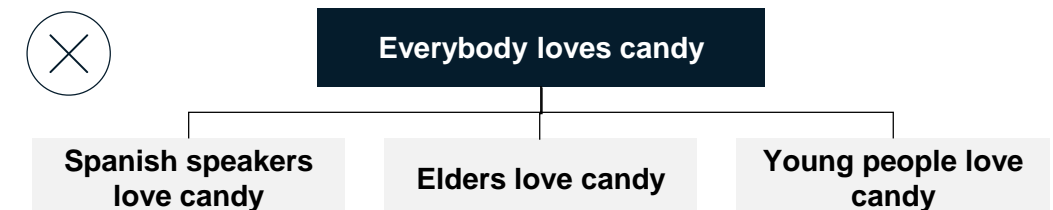
Summary vs. synthesis
Tips/techniques

Summary

A condensed version of all the facts

Synthesis

The "so what" of all the facts. Providing insight that all the facts together create

Example of summary vs. synthesis

There are several pain points that we heard from our customer interviews:

- In-store returns are a clunky experience and require customers to wait in line with paying customers

- Waiting time for inventory checks in-store is too long given customer demand and number of staff available

- Loyalty program sign-ups at the register require too much time to fill out

Overall, customers are looking for an enhanced in-store experience that reduces the time it takes from entry to exit and would opt for self-serve solutions to reduce the shopping-experience time

MODA Yoga Studio pyramid
Illustrative example
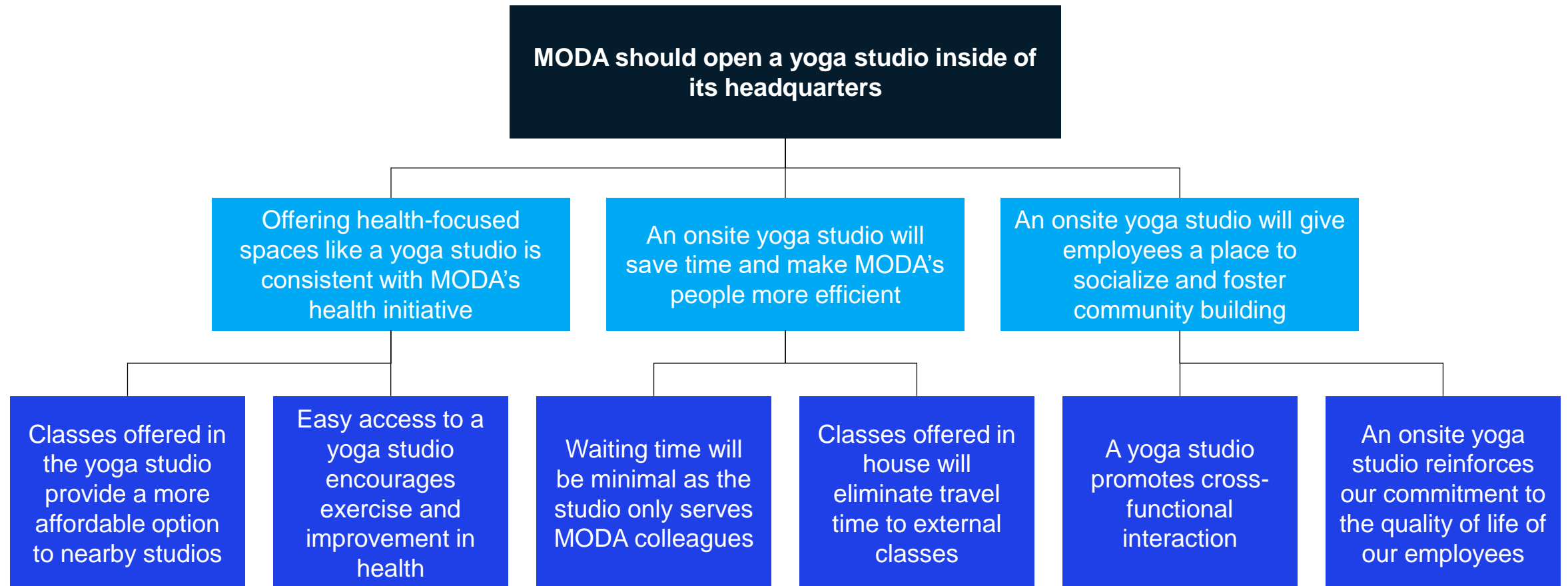
MODA should open a yoga studio inside of its headquarters

Offering health-focused spaces like a yoga studio is consistent with MODA's health initiative

An onsite yoga studio will save time and make MODA's people more efficient

An onsite yoga studio will give employees a place to socialize and foster community building

Classes offered in the yoga studio provide a more affordable option to nearby studios

Easy access to a yoga studio encourages exercise and improvement in health

Waiting time will be minimal as the studio only serves MODA colleagues

Classes offered in house will eliminate travel time to external classes

A yoga studio promotes cross-functional interaction

An onsite yoga studio reinforces our commitment to the quality of life of our employees

Contents

Develop a storyline: Key takeaways

Key takeaways
Core content

What is storylining?

- A storyline translates a pyramid-style message into the **narrative you will share with your audience**

- There are **many ways to tell a story** with the same set of facts—it all depends on your audience and the purpose

Why is storylining important?

- Turning your logic (i.e., pyramid-style message) into a compelling storyline is a critical way to **tailor your message to your audience**

- A storyline **wins your audience's hearts** whereas a pyramid wins their minds

How do I apply storylining?

Leverage the following tools and/or techniques to master developing a storyline:

- Storyline logic

- Storyboarding

- Channels for communication

Storylines
Framework

- Developing a storyline is in part sharing your findings with your audience, and in part creating a narrative that will move your audience to action

- There are **different approaches to storylining depending on your audience and the purpose of your interaction**

- Below is a simple formula you can use to create that narrative:

Introduction	Give a brief introduction that describes the situation or complication your presentation addresses
Question	Raise a question to be answered
Answer (governing thought)	Share your primary recommendation, which is drawn from your pyramid's governing thought
Key line statements	Support and expand on your recommendation using the arguments and data in your pyramid structure
Supporting data	
Conclusion	End with a conclusion that summarizes all of your key points

Different types of storylines
Tips/techniques

There are **many ways** to tell a story and convey your recommendations

The approach you take **depends on your audience and the context** of the situation

Every storyline will have a **brief introduction, a body, and a conclusion**

Common alternative body types

List	**Definition:** A list of considerations, factors, tips, etc.
	Example: There are thirteen red flags in managing change
	Purpose: Provides a lens through which the audience can assess their situation
Options	**Definition:** Options and criteria for assessing them
	Example: These are the criteria for the new plant location ... Our options are ...
	Purpose: Presents alternatives when no single compelling argument leads to conclusion; encourages decision making
Q&A	**Definition:** Question and answer dialogue – the questions are the audience's
	Example: Why are we doing this? What will change? How will it affect me?
	Purpose: Addresses the specific issues of an individual or group; creates a comprehensive reference source
Narrative	**Definition:** Story built around the journalist's 5Ws and an H (who, what, when, where, why, and how)
	Example: The salesforce lost focus; then customers left—to our main competitor …
	Purpose: Illustrates cause and effect relationships; describes processes

Converting pyramids to storylines (1/2)
Illustrative example

MODA should open a yoga studio inside its headquarters

Offering health-focused spaces like a yoga studio is consistent with MODA's health initiative

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Classes offered in the yoga studio provide a more affordable option to nearby studios

Easy access to a yoga studio encourages exercise and improvement in health

Waiting time will be minimal as the studio only serves MODA colleagues

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A yoga studio promotes cross-functional interaction

An onsite yoga studio reinforces our commitment to the quality of life of our employees

Converting pyramids to storylines (2/2)
Illustrative examples

Start with an introduction that describes the situation or complication your message addresses

Introduction

- In recent years MODA has undertaken an initiative to support the health and well-being of employees. Still research shows that
    - The average number of sick days employees take has increased by 2.4 days/year over the past five years
    - 75% of employees report going to an exercise establishment (e.g., gym, yoga studio, class) 2-3 times per week, citing "convenience" as the primary factor in that choice

Pose the question your message answers

What can MODA do to positively impact all of these metrics and support the health and well-being of employees?

Use your pyramid structure to answer the question and detail your supporting points

Answer: MODA should open a yoga studio inside its headquarters

- **Offering health-focused spaces like a yoga studio is consistent with MODA's health initiative**
    - Classes offered in the yoga studio provide a more affordable option to nearby studios
    - Easy access to a yoga studio encourages exercise and improvement in health
- **An onsite yoga studio will save time and make MODA's people more efficient**
    - Waiting time will be minimal as the studio only serves MODA colleagues
    - Classes offered in house will eliminate travel time to external classes
- **An onsite yoga studio will give employees a place to socialize and foster community building**
    - A yoga studio promotes cross-functional interaction
    - An onsite yoga studio reinforces our commitment to the quality of life of our employees
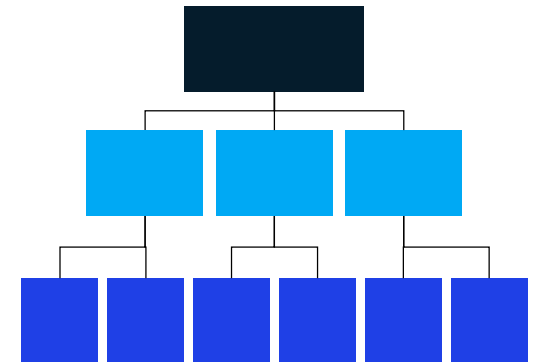
Summarize your key points in a succinct conclusion

Conclusion

Opening an onsite yoga studio supports employees' physical and social well-being and fosters cross-functional cooperation, while advancing the organization's long-term health initiative

Storyboards
Tips/techniques

What types of assets can you use in an effective storyboard?

A storyboard documents the messages you intend to share, the form they will take, and the order in which they will appear

Examples of visual assets that can be included in a storyboard:

- Videos to introduce an issue or illustrate audience or customer experiences

- Charts to depict quantitative findings

- Images to highlight key points

- Text-based assets, (e.g., quotes, paragraphs) that synthesize data

Considerations to keep in mind

- Not every audience wants to see the detailed analyses and evidence. Consider presenting high-level summaries of data and have the detailed information available as a handout in case questions arise

- Most audiences react well to communications that "start with a bang." Consider starting with a video or a demonstration

- If you have more material than you can cover, consider sending all or some components of your communication as a pre-read so that you can refer back to it during a presentation or discussion

- Don't bury key findings toward the back of a presentation; always look for ways to showcase them up front

- Remember to allow time for questions and discussion, especially if your event ends with a call to action

Alternative channels for communication
## Core content

■ Can be adapted to virtual setting

Workshop

A workshop is an interactive meeting with a group of individuals to drive in-depth discussions and/or activities on a specific topic

- Best suited for interactions where your purpose is to brainstorm new ideas, create alignment among a large group, and build understanding of a new process, concept, or idea
- Workshops inspire collaboration and allow groups to come together in an effective channel
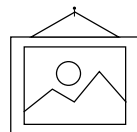
Gallery walk

A gallery walk is an interactive experience where a group walks around a room covered in a collage of visuals and text to engage with a specific topic

- Best suited for interactions where the purpose is to share a new concept or idea, give an experience of a journey, allow more time for participants to process information and explore content in different ways
- This approach gives individuals a creative environment, an active role, and positive energy to engage with the content

Offsite tour

An offsite tour is an opportunity to take a group of individuals to another location to view an example or demonstration of a particular topic

- Best suited for interactions where the purpose is to build the group's understanding of a particular process, concept, or topic; demonstrate what a best-in-class example looks like; and allow for time to ask questions

Email

An email is a type of channel used to communicate brief and structured messages

- Best suited for interactions where you intend to tell a specific message or ask a specific question/demand of the group
- It is not ideal for lengthy interactions that require significant input and discussion or for interactions that require intense engagement and collaboration

Video conference

A video conference is used to bring together individuals who are not present in the same space

- Best suited for interactions that do not require complicated group breakouts, physical activities, and/or supporting materials that need to be presented simultaneously
- A video conference is a great substitute for in-person meetings and provides an opportunity to connect with individuals from other geographies

Internal chat platform or collaborative workspace

An internal chat platform or collaborative workspace is used for brief group or one-on-one messages in daily communications

- Best suited for interactions that require collaboration as it is better than email for creating threads or workspaces to keep topics and content organized and easy to find; also used to get a quick decision from an individual
- Chat platforms are a great alternative to in-person meetings when decisions or input can be shared quickly and succinctly

Contents

Craft inspiring communications: Key takeaways

Key takeaways
Core content

What is a conversation?

- A conversation is an interaction which is on-going, fluid, and **involves two-way communication**

- Planning for the **conversation requires reflection** on what you know about the other person or people, your shared purpose, and the insights you will bring to the conversation

Why is crafting inspiring communications important?

- It is important to **spend time crafting inspiring communications** because high-impact conversations do not happen by chance

- Success is more likely if we spend some time planning and orchestrating the flow of important interactions

How do I apply crafting inspiring communications?

Leverage the following tools and/or techniques to master crafting inspiring communication:

- The Four Techniques for Crafting a Message

- Change stories

- Email must-haves

EPIC guiding questions
Worksheet

Conversation
Plan and orchestrate the flow of an effective two-way conversation

What questions do we ask ourselves?	Write your answers here
How will you use questions and statements to spark the discussion? What questions might the other person have?	
How do you want the conversation to start and end (on a high note)?	
How do you want to deliver your message? How will you use the supporting materials and why?	

Four Techniques for Crafting a Message
Framework

The Four Techniques for Crafting a Message framework helps to inspire your audience so they can understand, believe in, and act on your ideas. Logic and facts can convince your audience to act, however emotion can *inspire* your audience to act

Infusing your message with personal meaning, emotion, and conviction

For example, consider the difference between "The merger will certainly succeed" and "I am certain that the merger will succeed"

Incorporating stories with emotion to make the message specific and concrete

For example consider the difference between, "teams are losing enthusiasm, and we are experiencing increased attrition" and "last week, I lost three team members. All of them cited boredom as a key factor in their decision to leave the organization"

The Four Techniques for Crafting a Message

Using rhetorical techniques such as repetition, visual imagery, and analogies

For example, consider the difference between "We have an exciting opportunity to enter into new markets around the world with our product" and "We have the opportunity to reach thousands of Rebekahs and Rajeshes around the world and improve their quality of life with our products"

Balancing positive messages with negative messages

Studies suggest that you should have a ratio of three positive messages for every negative message you share with your audience
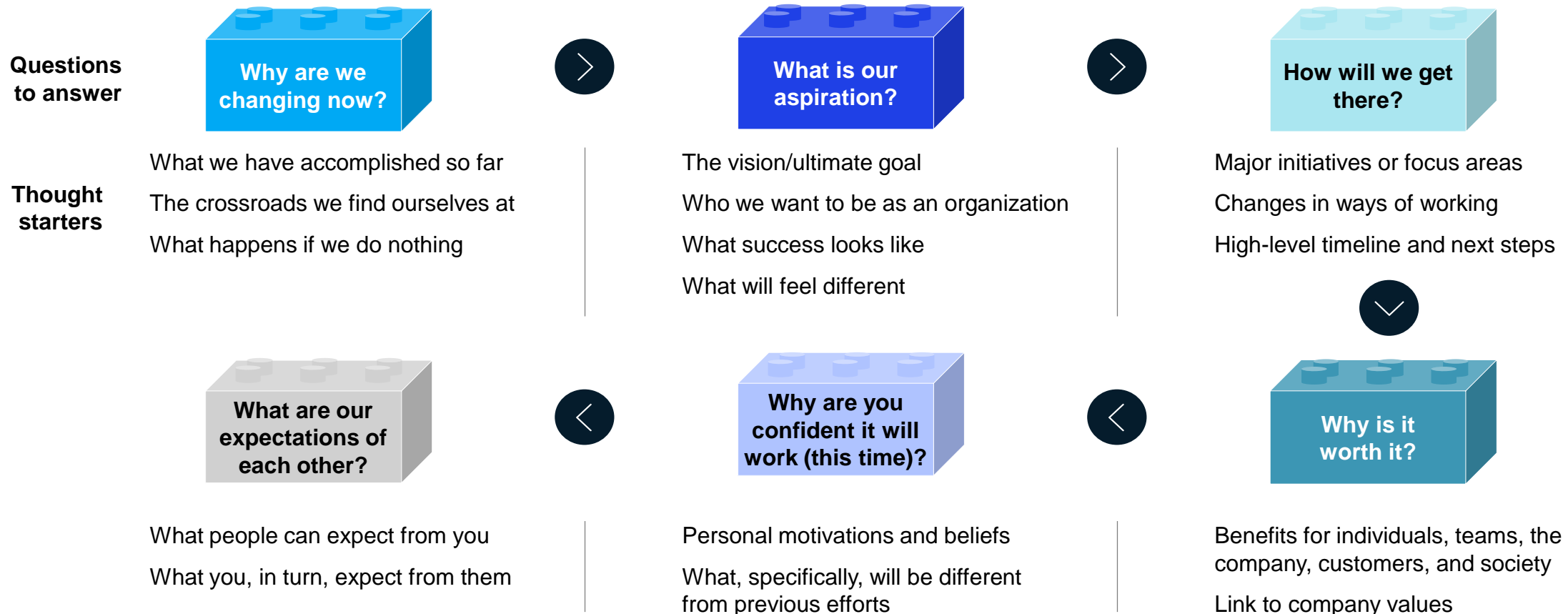
Four Techniques checklist
Checklist

Four Techniques for Crafting a Message	Checklist for crafting a message	Write your examples here
Infusing your message with personal meaning and conviction	❑ Would your audience understand why this conversation matters to you? ❑ Do you have clear statements that illustrate your beliefs, thoughts, or feelings?	
Incorporating stories to make the message specific and concrete	❑ Does your message incorporate any personal stories? ❑ Is the story specific and relevant to your conversation?	
Balancing positive messages with negative messages	❑ Do you incorporate enough positive messages to counterbalance negative messages? ❑ Is there enough contrast in your message?	
Using rhetorical techniques such as repetition, visual imagery, and analogies	❑ Does your message engage your audience's imagination? ❑ Are you helping simplify or visualize complex concepts for your audience?	

Change stories – Six major questions
Framework

A change story is a clear, compelling, and aspirational description of the what, why, and how of the transformation. It is also a personal message from leaders, adapted to individual contexts. It can provide a reason to continue going when plans fail

Questions to answer

Why are we changing now? > **What is our aspiration?** > **How will we get there?**

Thought starters

What we have accomplished so far

The crossroads we find ourselves at

What happens if we do nothing

The vision/ultimate goal

Who we want to be as an organization

What success looks like

What will feel different

Major initiatives or focus areas

Changes in ways of working

High-level timeline and next steps

⌄

What are our expectations of each other? < **Why are you confident it will work (this time)?** < **Why is it worth it?**

What people can expect from you

What you, in turn, expect from them

Personal motivations and beliefs

What, specifically, will be different from previous efforts

Benefits for individuals, teams, the company, customers, and society

Link to company values

Email must-haves
Checklist

Email must-haves	Keep in mind …	Checklist
Know your audience	This includes considering the needs and interests of the people you're addressing. Communications that are directed at an entire group—e.g., a team, a department—require an extraordinary amount of care and attention Choose your words carefully and qualify your statements appropriately. Tailor the message to the group	❑ Do you expect that they will have a strong reaction to the information you're delivering? If so, try to anticipate their questions and concerns and address them head on ❑ Do you need them to act on something, and how quickly? If so, make your call to action very clear by stating it up front or setting it apart from the rest of the text ❑ Are you addressing an audience that includes non-native speakers of your language? If so, consider the vocabulary and idiomatic expressions that you choose
Structure your message	This includes using top-down structuring to convey your message in a succinct and easily scannable format Any essential content should appear in the first few sentences with supporting information to follow	❑ Does your email start with the answer/ask/main idea first? If not, state your governing thought in the first few sentences of the email ❑ Is your email one or many large paragraphs of text? If so, cut away the unessential and use numbers or formatting to separate the content in logical groups
Avoid the unnecessary back-and-forth	This includes double-checking your emails to ensure that the conversation remains focused on the key messages at hand This requires ensuring that dates, attachments, and copied recipients are correct before hitting send. This also means paying attention to the subject line and creating new threads for unrelated topics that can cause confusion	❑ Are you fitting in multiple, unrelated topics in the same email? If so, create a new thread to separate conversations and focus the group ❑ Are the number of email recipients copied and attachments getting hard to track? If so, take 5 minutes before hitting send to double check each element to save everyone time and confusion from a mistake

Email must-haves
Illustrative example

Subject line alerts readers that there is action required

Paragraph #1 states concisely why the meeting planner is sending the email. The email quickly confirms the meeting plans.

Paragraphs #2 and 3 articulate the need for participants to come prepared to meet the stated objective.

Contents
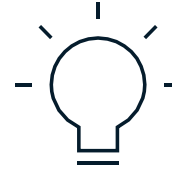
Deliver with style: Key takeaways

Key takeaways
Core content

What is delivery?

- Delivery can be broken down into three elements: **physical presence, vocal emphasis**, and **emotional connection**

- The **way you deliver a message greatly accounts for the impact you have on your audience**

Why is delivery important?

- According to new research speakers who vary the pace, pitch, and volume of their voices **deliver more influential, persuasive, and commanding presentations**

- It's not just what you say that matters; it's how you say it

How do I apply delivery?

Leverage the following tools and/or techniques to master delivery:

- Three elements of style for delivery

- Delivery checklist

- Virtual delivery tips and tricks

Three Elements of Style for delivery
Framework

Physical presence

- This refers to the speaker's ability to appear relaxed, confident, and in control of a room

- Speakers with strong physical presence have good posture, make good eye contact, avoid fidgeting, use gestures appropriately, and move with confidence

Vocal emphasis

- This primarily refers to the speaker's ability to adjust his or her pitch, pace, and volume to match the occasion

- In addition, speakers with good vocal emphasis typically speak in the active voice and rarely use qualifiers or caveats

Ability to make an emotional connection

- This refers to the speaker's ability to gauge the mood of the audience and adjust his or her tone accordingly

- Speakers who are able to make an emotional connection typically make strong eye contact with their audiences and communicate emotion via their facial expressions and tone of voice

Three Elements of Style for delivery
Checklist

The upcoming opportunity I've chosen is:

My audience is:

The Purpose of my interaction is: *E.g., Inspire a colleague to take on a leadership role on my project*

Vocal emphasis	**Physical presence**	**Emotional connection**
❑ Adjusts pitch, pace, and volume to match the occasion	❑ Appears relaxed, confident, and in control of the room	❑ Express authentic emotions and/or vulnerability
❑ Uses the active voice	❑ Has strong posture	❑ Selects an appropriate tone to match the Purpose of the interaction
❑ Minimizes qualifiers and caveats	❑ Moves with a purpose	❑ Has strong eye contact and uses appropriate facial expressions
❑ Uses rhetorical techniques appropriately (e.g., repetition, alliteration, three-point lists, pauses for impact)	❑ Uses appropriate gesture	❑ Uses storytelling
	❑ Optimizes physical environment	

Notes

Virtual tips
Tips/techniques

The same delivery techniques that work in person still apply to virtual settings; however some techniques are emphasized more or less because of the medium. Nevertheless, it is still important to think about your audience and what will work best to connect with them and inspire them to action

1
Limit your body language

Using body language in person can be quite effective; however on a camera it can exaggerate your movements and distract others

Use your movements intentionally and try to keep them more level, on the same physical plane

2
Find the right camera height

If you are on a video conference, your camera should be positioned roughly at eye level

Angles that are too high or too low can distract your audience and take away from your message

3
Integrate moments of eye contact

It can be difficult to maintain eye contact virtually due to the positioning of your camera and your audience's videos

However for an important key message, it's worth looking directly at the camera to better emphasis your message

4
Leverage your voice

Infuse your vocal presentation with energy by varying your tone and pace to keep the audience's ear engaged

Vocal emphasis is important whether the presentation is in person or virtual

Contents

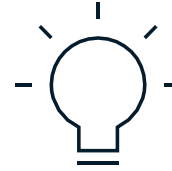# Facilitate an active discussion:
Key takeaways

Key takeaways
Core content

What is facilitation?

- Great facilitation requires making it easier for other people to understand key messages shared, and uncovering what else people may be thinking or feeling
- Facilitation is equally important whether you are interacting with one person or one hundred people

Why is facilitation important?

- Effective facilitation can help guide a group to alignment, commitment, and action
- A great facilitator deploys many effective communications techniques to ensure the conversation is impactful and inspires people to action
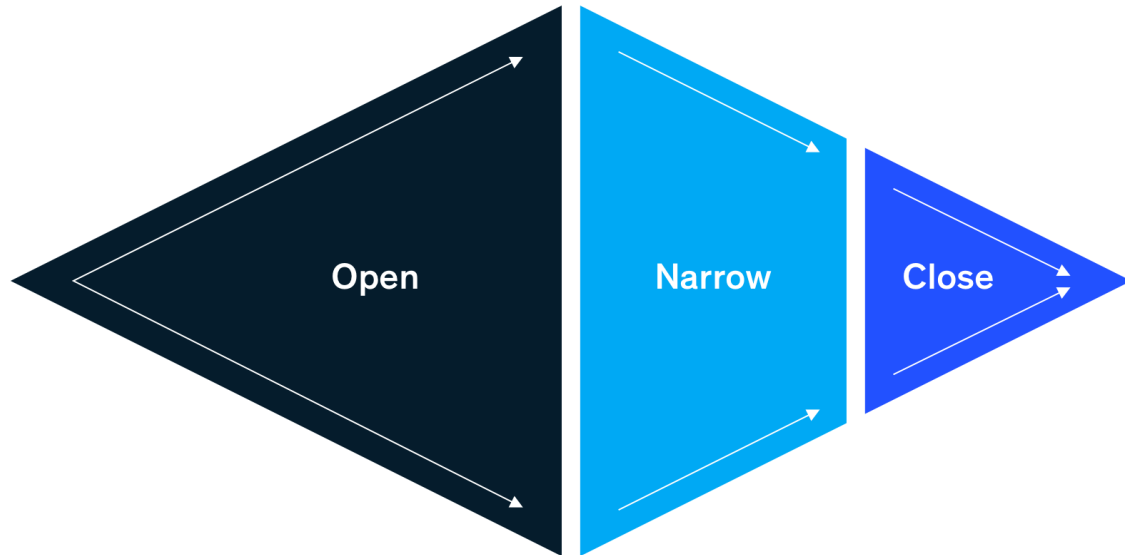
How do I apply facilitation?

Leverage the following tools and/or techniques to master facilitation:

- Open, Narrow, Close
- 4Ps (Purpose, Payoff, Preview, Process)
- Closed-loop conversations
- Ask/Tell matrix

Open, Narrow, Close
Framework

The **Open, Narrow, Close** approach to facilitation can serve as a useful architecture for your meeting

- **Opening** a conversation is about making people feel comfortable about who they're with and what they're going to do in the meeting

- **Narrowing** in on the conversation involves the right mix of questions and statements to help keep the thinking and process on track and to create an inclusive and open environment

- **Closing** a conversation is about reaching alignment and synthesizing the group discussion with key takeaways and next steps with owners and deadlines

The 4Ps (Purpose, Payoff, Preview, Process)
Core content

Purpose – The reason for the workshop

Example: When we last met, we kicked off a study aimed at identifying attractive international markets for Bigco's widgets. Today, I will share with you the team's recommendation, and why we think this is the best solution

Payoff – What the audience will gain

Example: By the end of the meeting, we will be one step closer to entry into profitable global markets, and I hope you will all feel confident about and excited that we're approaching this in the best possible way

Preview – The major points you will cover

Example: Today we will discuss why Brazil should be the first target for Bigco's international expansion. We will look at 1) the growing demand for high-quality widgets in Brazil, 2) the attractive economics, and 3) the extremely low entry barriers

**Process** – How you would like to run the session

Example: We want this to be a highly interactive session. We'll have plenty of discussion in breakouts. Ask questions in chat if you have any technical challenges, etc.

The 4P's are used to introduce meetings, presentations, and workshops

Closed-loop conversation

Tips/techniques

Closing a conversation is about **reaching alignment and synthesizing the group discussion with key takeaways and next steps** for action
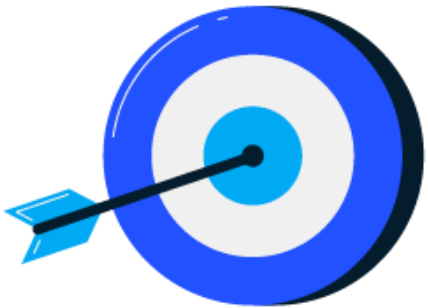
What needs to be done?

Make sure it's

- Measurable
- Action oriented
- Linked to priorities

Who is doing it?

One person is accountable
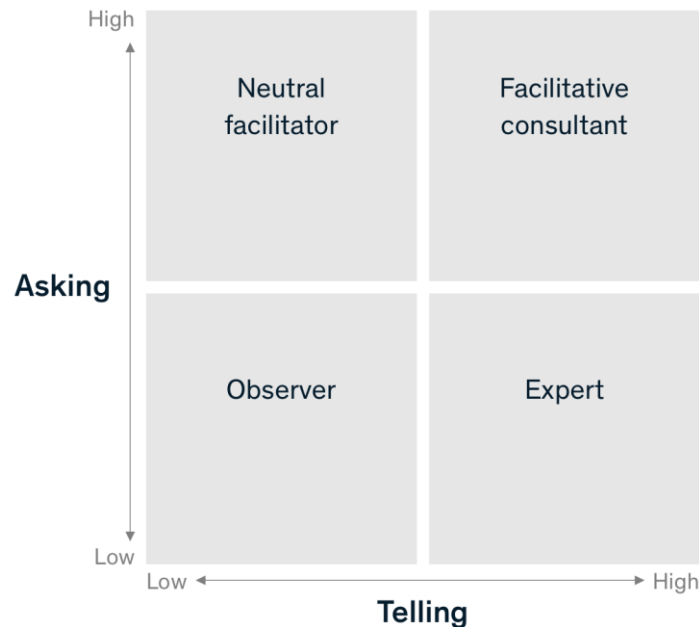
Someone in the room signs up and commits

And when?

Specific date for the outcome to be delivered

Ask/Tell Matrix
Framework

The **Ask/Tell Matrix** is a framework to help define the facilitator's role in one of four ways. **Asking** involves the process of understanding the views of others by asking questions and exploring their thinking. **Telling** involves the process of trying to convince others by stating your own views and supporting rationale.

Neutral facilitator

Does a lot of asking, with focus on guiding meeting process. Can steer people through a tricky agenda, make sure everyone is heard and all issues are addressed, and help reach consensus

Facilitative consultant

Balances asking and telling, guiding meeting process while making strong content contributions. Can help group reach a well-supported decision

Observer

Watches carefully for group dynamic issues, signs of enthusiasm, concern, fatigue, etc. Can spot clues in body language that others may miss

Expert

Shares knowledge-making content, not process-related contributions. Can open group's eyes to new concepts and approaches