

# Communication Methods that Make Sense – and Make Your Point

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# Course Overview

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Ever thought about how social media is often not very "social?" People rely more and more on devices and "one-way" communication tools. But they're not always the best way to communicate. Hearing and seeing someone, body language, and gestures all improve the odds of getting your message across and making your point. In this course, you'll learn how to select the best communication methods to convey your intentions and target your audience, leaving them feeling informed, enlightened, and engaged. Let's put the personal back into interpersonal.

*[Scene opens: The host is holding a cell phone. It receives an alert while he's talking.]*

Oh, just a sec.

*[The host checks the alert on his cell phone.]*

I mean there's nothing **wrong** with social media.

# Matching Communication Methods with Intention

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## Learning Objective

*After completing this topic, you should be able to*

- *choose interpersonal communication methods that are most appropriate based on your intention*

## 1. Match communication method and intention

Hey, how's it going?

*[Scene opens: Cary is sitting at a table in the break room as Joe enters.]*

Going? I can't even think straight. I've got to get information to the project team so they know what to do next. Engineering wants feedback on the design, and I need a few extra bodies from R&D and QA. I know I have to communicate all this, but **how**? I feel like screaming. Would screaming work?

*[Cary is extremely stressed.]*

Here...you need this more than me.

*[Joe hands Cary his cup of coffee.]*

Screaming isn't usually the best way to communicate. In fact, the way you communicate is tied to the intention behind your communication. Screaming says your intention is to panic.

*[Joe leaves and the host enters.]*

Generally, there are three main intentions behind communication: to inform, to give feedback, or to influence. And think of the options you have to convey your message to support your intention: text message, e-mail, face-to-face, social media, phone calls, videos, presentations. When you're informing, you want straightforward communication methods that provide a documented copy of the information that people can refer to. So text-based methods are best. Face-to-face and phone are less ideal. When you're giving feedback, you want to invite discussion and two-way interaction, as well as convey your tone and feeling. So here, face-to-face is best. Phone is a last resort if face-to-face is impossible, but text messages, e-mails, and postings to social media definitely aren't appropriate. When you're trying to influence, you want a method that lets you use body language and visuals as much as possible. You want to invite reactions and responses to your message. Dynamic, visual methods are ideal, although e-mail and social media may let you influence your audience to some extent.

*[A table shows the best communication methods to use for different intentions. For Inform, text message, e-mail, social media, video, and presentation are indicated. Face-to-face and phone are marked "partial." For Feedback, only the face-to-face method is indicated. For Influence, face-to-face, phone, video, and presentation are indicated, and e-mail and social media are indicated to be partially effective.]*

So what will work best for Cary? Let's look at the three things she wants to communicate.

I've got to get information to the project team so they know what to do next...

Cary could inform by e-mailing a meeting invitation to the team and discussing the current status of the project during the meeting. Afterward, a follow-up e-mail will help the team keep track of the important details that were discussed. Cary needs to give feedback too.

Engineering wants feedback on the design...

For Engineering, feedback via a virtual meeting through video conferencing can allow Cary to outline product design changes and give them what they need. From there, they can figure out how much work is involved and how it will fit into their schedule. Cary also wants to influence.

And I need a few extra bodies from R&D and QA.

To influence the R&D and QA groups, Cary could use a presentation to give an overview of the project and how she sees their team members fitting into it. It's a lot easier for people to say yes if they understand the scope of their involvement.

Finally, Cary could create an intranet project site with a forum for questions and answers that would take a lot of the pressure off about keeping everybody informed. That's one she can do for herself.

Wow, that coffee's strong! But it cleared out the cobwebs!

# Considering Other Factors When Communicating

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## Learning Objective

*After completing this topic, you should be able to*

- *recognize how factors other than intention inform your decision on which method to use for your interpersonal communications*

## 1. Choosing the best communication method

Let's talk about choosing the best communication method. Essentially communicating with impact is...

*[Scene opens: the host is interrupted by Joe and Cary walking into frame.]*

You're not texting her, are you?

What? Oh, I know. She'll be so disappointed though. I feel really bad.

Well but if Alison had...wait, so who's going to design it now? The launch is Friday.

*[Joe is slightly confused.]*

Yeah, I've been meaning to talk to you about that.

*[Joe and Cary walk away.]*

Sounds like Alison's design for the new marketing launch has been rejected. She put a lot of work into that design. Messages can offend if they're not conveyed in the right way. And a text was not the best way for Cary to break the news.

Texting is great for exchanging information, but it's impersonal. When there are other factors to consider, it's not always the best option. Cary doesn't want to face the awkwardness of delivering bad news in person and is anticipating Alison's emotional response, but what about Alison's needs?

Two-way methods of communication – a face-to-face conversation or a phone call – work best in emotional situations. It gives you the chance to discuss the situation and come to an immediate understanding.

Although it's always necessary to keep your primary intention in mind, there are other factors to weigh when deciding which method is best for your audience. These factors include emotion, privacy, dialogue, motivation, recall, and generation differences in the workplace.

*[Joe and Cary enter the scene again.]*

Alison's met with Felix...

Felix? Who? VP Felix?

*[Cary looks a little startled.]*

Well, you didn't hear this from me, but I guess she sent him an e-mail complaining about her design being rejected!

*[Joe and Cary walk away.]*

So Alison sent Felix an e-mail and now everyone knows about it. If your communication isn't for public viewing or you don't want others to hear about it, avoid texts, e-mails, and social media. Unless your settings are managed tightly, it's all too easy for privacy to be violated. And rumors, like this one, undermine a productive and harmonious workplace.

Frank is **not** happy. He just sent you an e-mail cc'ing everyone...

*[Joe and Cary enter the scene.]*

OK, that's it. Let's quit all this texting and e-mailing. We need to get everyone together to finalize roles and expectations once and for all.

*[Cary's tone and body language are emphatic. Joe and Cary walk away.]*

Cary's on track here. E-mail trails are OK sometimes, but there's nothing like a well-facilitated meeting for a productive discussion.

And let's face it: motivating people is a challenge! A lot of motivation comes from the tone and nuance of speech, body language, and actions. Meetings where face-to-face interaction, dialogue, and body language combine with video or graphic presentations can motivate in more ways than written communications alone.

*[Joe and Cary enter the scene.]*

That went well.

*[Cary's tone and body language are positive.]*

Yeah! But a lot's hanging on this launch. I'm just glad you took some notes.

*[Joe's tone and body language are positive. Joe and Cary walk away.]*

When the big day arrives, Cary needs to make sure that no detail of the launch is overlooked.

If you want someone to remember steps, guidelines, or instructions, you'll have to describe them. A job aid can be useful here. Attention spans are short these days.

One more consideration: the generation differences in your organization. Intention always drives your decision when choosing how to communicate, but you should be aware of your audience preference.

Younger workers like Millennials and Gen Xers are used to texting and posting comments on social media. Boomers rely on e-mail and voice messages, while Traditionalists may want a hard copy from time to time. So using texting for a reminder or for acknowledging a person's community efforts on social media is best.

Don't categorize people, but do offer as many options as possible.

# Making E-mail Everyone's Friend

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## Learning Objective

*After completing this topic, you should be able to*

- *improve the effectiveness of e-mails*

## 1. Making e-mail everyone's friend

9:15 and 45 e-mails already? I cannot deal with this today.

*[Scene opens: Cary is scrolling on her smartphone, looking and sounding a bit annoyed, while Joe looks on.]*

Ouch.

Ten of these are from that Tom guy in Marketing and they're all titled "launch event." Look, guest list...press release...equipment for slide presentation. This one just says "thanks you" for the e-mail I sent him! Would it kill him to run a spell check?

*[Joe reads over Cary's shoulder. He then notices something off-screen and tries to get Cary's attention as she speaks.]*

Oh. Hey, Tom.

*[Joe waves to someone off-screen. Cary looks sheepish.]*

E-mail is now the primary method of communication in the business world. It connects people around the globe and enables colleagues to exchange information regardless of location or time zone. Of course, as Cary just found out, sometimes nothing travels faster than the human voice.

*[The scene changes to the host.]*

How often does someone show up in your office, or come up behind you, to say "I just sent you an e-mail." Now, why would they take the time to walk over and tell you that? We all know why. Just because you sent me an e-mail doesn't mean I read it or understood your intention – especially if it wasn't directed at me personally or it was poorly written.

You probably already know the basic rules for e-mail. Use e-mail for messages without emotional content. Don't fire off a reply if you're angry, upset, or frustrated. Use emotional intelligence. Essentially, you want to build a respectful e-mail culture.

Those are good, basic rules, but you should broaden your skills. Let's explore some specific e-mail techniques, loosely grouped into three categories. First category: know your intention and your audience. Know what you want your reader to **do** with your message. Imagine how you'd say it face to face. If that proves difficult or seems to require a nuanced conversation, it's a good sign the message might not be suitable for e-mail at all.

Which leads us to knowing when **not** to use e-mail. If your request is simple and brief, then text an invitation for a quick call instead.

Respect other people's time. Combine your messages when you communicate frequently with someone, instead of sending separate "one-liner" e-mails. Create one meaningful thread that's easy to reply to and keep track of.

Think about who's on the To, Cc, and Bcc lines, and adjust them to match your intention. Make sure the person in the "To" line is the one to take the action. Cc means "courtesy copy," so limit it to people who should be kept informed but who aren't required to act. Bcc is intended to be a "blind" courtesy copy. But if there's some reason you can't openly include someone in the Cc line, maybe you should send them a separate e-mail instead, forwarding and explaining what you had sent in the original.

*[A sample e-mail appears. In the To line, the names Cary E, Joe C, and Jen R display. In the Cc line, there are the names Sue L, Miguel H and Li Y. In the Bcc line there is one name: Dennis B. The subject of the e-mail is "Launch Event" and, so far, all that is contained in the mail itself is the text "Hi Cary." Joe C and Jen R are then removed*

*from the To line and added to the Cc line. Sue L and Miguel H are removed from the Cc line. Dennis B is then removed from the Bcc line.]*

OK, so you know who you're e-mailing. Let's talk about the second category: content structure and format. More important than you might think. The subject line, contents of your message, and structure of an e-mail have a lot to do with its effectiveness.

Use the subject line to your advantage. Make it clear and specific. It's OK to make it attention grabbing, but first and foremost it must be clear. So, "Update on Launch Event," clear. "Launch Event: Demo Video Idea" – that's clear **and** grabs your attention. Here's something people often forget: put the most important information toward the beginning. Don't bury important details at the end and risk people not reading them. And keep e-mails short! One screen is already too long. And it's OK to use attachments, but don't overdo it. And summarize the key points of the attachment in your e-mail.

*[The sample e-mail from earlier displays again, with the following text in the e-mail body: "Hi Cary, It was so nice to see you at the company picnic last month. It was a real pleasure to meet your husband. Your children are delightful. You must be so proud of them! I have been thinking about the upcoming launch and I think that, if we can get funding from Finance, we could get the software engineers to produce a demo video to be shown at the launch event. Please check in with Gus in Finance to see if the budget allows for this. I'll need to know before Friday the 12th. When you speak to Gus, you could mention that a demo video might • Help members of the press with their product review • Encourage retailers to put in advance orders Thanks for all your help on this project. Kind regards, Tom" Some changes are made to the e-mail. First of all, The subject "Launch Event" changes to "Launch event: demo video idea." Next, the entire first paragraph is deleted. The first sentence of the second paragraph is simplified to "For the upcoming launch and, if we can get funding from Finance, the software engineers could produce a demo video to show at the launch event."]*

And the last point about structure, your intent. Do you want to inform, give feedback, or influence? And how does writing e-mails to do one or the other differ? It's pretty simple. Inform – people make their own decisions about what to do with the information. The cafe is closed, the procedure is this, the policy is that, here is a list. But writing to influence means you're looking for action – maybe seeking agreement or a decision, or looking for input. Once you're done writing, double-check your language to make sure it supports your intention.

Final category: policy and privacy considerations. First and foremost, adhere to your company's policies for e-mail. E-mails sent inside your organization are not private. You don't own the server.

And here's a lesson people never seem to learn: don't put anything in an e-mail that you or one of your coworkers wouldn't want on the front page of tomorrow's paper.

A final tip: establish ground rules with your coworkers and team – "can we stop sending 'thank you' e-mails" or "can we use subject lines to let one another know the urgency of the e-mail?" Together, find a way to balance camaraderie with a respect for one another's time.



# Making a "Face to Face" Communication Connection

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## Learning Objective

*After completing this topic, you should be able to*

- *recognize ways to plan, deliver, and connect with your audience during face-to-face interpersonal communications*

## 1. "Face to face" communication connections

I can't do Thursday. No, Sanjay just asked me to get the team together – review the new marketing strategy, generate some ideas....What? In front of the whole group? But they're flat out on the logic project, do you think they have time for this? Yeah, it does show confidence in me, I guess, but...OK...OK. Later. I need to generate some ideas, all right.

*[Scene opens: Cary is speaking on her cell phone. As she receives the news, she is stressed by what she is being asked to do, but also accepting of it. When she hangs up and speaks the last sentence, she is daunted by the task she is faced with.]*

A "face-to-face" is an opportunity to grab people's attention and engage them in the information and ideas you're presenting and sharing. As well as in-person communications, "face-to-face" also covers video calls, virtual meetings, and video conferencing. Cary may be nervous, but she **can** win her audience over.

*[Scene changes to the host.]*

She is obviously stressed about her meeting and may have a tough audience. But all is not lost.

She just needs to focus on three things: planning, delivering, and connecting.

Whether it's a meeting, a presentation, or a conversation, planning is the first step to achieving a successful outcome. So, out of the gate, determine what you hope to achieve – your intention. Is it to inform? Influence? Give or receive feedback?

Next, think about your audience. Whether it's a large group or just one decision maker, you have to consider what they know, need, their styles, their level of interest. How can you best engage and communicate with them?

Then figure out how to work within any constraints. The amount of time you have – if it's a global meeting, you have time zones to consider. You don't want to be calling people in the middle of the night.

Think about group size, the location, access to technology. Ah, technology! It's meant to make things easier, but it can undermine you at the worst moment. Ever show up with a video presentation but there's no wall socket nearby? It happens! Decide what technology or visuals you'll use and how they'll support your message. But expect the unexpected. And remember, the potential for distraction with a lot of visuals – or technical issues – could outweigh the benefits.

OK, so say you've done the planning. Now what? Delivering. Demonstrate credibility and authenticity. This is one of the best ways to build trust. Establish the context of the meeting and your main point early on.

You've got to stay focused on your intention. Don't ramble or allow yourself to deviate from your message. It's OK to acknowledge "off-topic" comments from your audience, but take them up later.

Your nonverbal message needs to match your verbal one, so practice using effective body language and tone. Use your tone of voice to convey a positive attitude, and inflection to emphasize key points. Look at your audience – eye contact implies sincerity. Your face tells a story – it lets people see your emotions and attitude. And there's nothing like a smile to make everyone warm to you and your message. Gestures help support your message too, but keep them professional.

OK, you've got their attention, now it's about connecting. You can actually start working on a connection even before you're face-to-face. Reach out first with an e-mail or text. Add a question to your invite – it's an ideal way to get people thinking and start building trust from the get-go.

So you're standing there, doing your thing...wait a sec. Is it getting a little noisy? Uh-oh. You're losing people. What to do? Well you can't physically shake them up, so instead shake them up mentally by asking some open-ended questions. Nothing like a little pop-quiz anxiety to perk up an audience. Weave in some relevant examples and personal stories that everyone can relate to. Stories will help you get "buy-in." People stop seeing "a problem" and start seeing "**our** problem." Another good one – engage in activities or challenges related to what you're talking about. You could take turns coming up with new uses for random items around the office in order to stimulate creativity. You have a whole room full of ideas at your fingertips. Don't let that brainpower go to waste. Just set a few ground rules to make sure all ideas and comments are respected and respectful. Establish a judgment-free zone and let loose imaginations in pursuit of solutions.

Expectations are often high when people take time to attend a meeting, presentation, or conversation. Careful planning, delivering, and connecting with your audience will ensure you live up to those expectations.

Sanjay? Hi. About the meeting? Yeah, I think I can make it work.

*[Cary makes a call on her cell phone. She looks confident.]*

# Communicating Effective, Constructive Feedback

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## Learning Objective

*After completing this topic, you should be able to*

- *use a process to communicate feedback in an effective, constructive manner*

## 1. Effective, constructive feedback

You probably didn't mean it, but earlier, when we were in the meeting...you kept...uh...well, you kept checking your phone and it...it really bothered me. I mean, it was...it was my first time leading the meeting....

*[Scene opens: Joe and Cary are speaking to each other on the phone. Joe looks bothered and flustered.]*

Yeah, sorry, I was waiting to hear back from someone.

*[Cary looks neutral, like she hasn't registered Joe's annoyance.]*

I know...I know you're busy. It's just...when you do that...

*[Cary glances at her phone while Joe is talking]*

Oh, got another call. It's the events manager, gotta run. Talk later. Hi. Great. You?

*[Cary takes a new call and walks away. Joe looks at his phone in disbelief as he is cut off.]*

How is anyone supposed to know when their actions or behavior are not being well received? Or that their lack of action is causing a problem in their organization?

*[The scene changes to the host.]*

Sometimes, you have to do more than just inform or influence others. Sometimes, you have to give constructive feedback. We all have a responsibility to help one another improve and, if necessary, point out habits or behaviors and explain why they're standing in the way of achieving success. We also need to reinforce good practice, and praise and encourage habits and behaviors that drive the company's success. That's not just a manager's job.

Joe had an important point to make when he called Cary. He was giving her feedback as a friend – feedback that might just save her from getting more painful criticism from her boss one day. Cary was not only rude and disrespectful to Joe. Not paying attention or participating in meetings is detrimental to her overall job performance.

But Joe could have approached Cary in a more effective way. His first mistake? Picking up the phone. The best method for giving feedback is face to face. If that's not possible, you could have a video call, which keeps the face-to-face contact. A phone call should be a last resort.

So, say you're facing each other. What next?

*[Cary and Joe are standing facing each other.]*

Well, there's a process for that – one that builds trust and gets your point across. First, invite the other person to have a conversation.

Remember to use friendly body language and a relaxed tone of voice so that the interaction gets off on the right foot.

*[While the host speaks, Joe is speaking to Cary. He's smiling and his gestures are welcoming. As Cary responds, she smiles.]*

Then, relate to a specific business reason why you want to have this particular conversation. Explain, using examples and emotional intelligence, what you experience or observe in the other person and why it's a problem or prevents successful business results. In Joe's case, he would point out how...

...in other meetings he'd had with Cary, she was often focused on her phone while everyone else was focused on the meeting. He explained how it wastes time to explain to her what she missed when she was distracted, and how it's disrespectful to the others whose time is just as valuable.

*[While the host speaks, Joe takes out his phone and explains something to Cary. He is calm but serious. Cary's facial expression is sympathetic and apologetic in response.]*

Suggest a solution – what you'd like to see instead. Joe could suggest that...

...when Cary brings her phone to a meeting, she could put it on "silent" and turn it facedown on the table in front of her.

*[While the host speaks, Joe calmly discusses something with Cary, phone in hand. Cary's expression is receptive and she appears to be in agreement.]*

Make sure you involve the other person in the conversation. It shouldn't be a monologue. And finally, work together on a plan for change.

Joe could suggest that in the next meeting they're in, they both try out this approach and compare notes on what came in on their phones during the 30 minutes.

*[While the host speaks, Cary and Joe continue to discuss in an animated way. At the end, they both smile and nod in agreement.]*

Giving feedback is a challenging interpersonal communication, but it can be learned. You can follow a process like this one but, you know, people are people and emotions can run high.

Emotions often prevent people from giving feedback at all. There's the fear that the other person will be shocked or surprised. Worse, they may be hurt or angry. You may fear that your relationship will be damaged. Just remember, feedback is meant to improve behavior and get business results. Without supportive feedback, people will remain blind to their problematic behavior. They miss the opportunity to improve.

If you treat the recipient of your feedback with respect and sensitivity, they're likely to appreciate your comments, even though they may still become emotional. If a person does become emotional, show empathy. Acknowledge the emotion but don't fall into the trap of taking back the feedback. Rely on the process to help guide you through the conversation and stay true to your intention.

And before the conversation ends, make sure that you're both clear about why the present behavior falls short and what needs to change. When you encounter barriers to feedback, you'll be glad you've given the matter some thought and that you care enough to manage your own emotions and respect those of others, while still making your point.

# Exercise: Communication – Making "How" Match "Why"

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## Learning Objective

*After completing this topic, you should be able to*

- *choose effective, efficient communication methods that properly convey intent*

## 1. Exercise: Communication "how" and "why"

Getting a communication strategy right is about selecting the best communication methods to convey your intention and target your audience. By doing so, you improve the odds of getting your message across, making your point, and leaving your audience feeling informed, enlightened, and engaged.

In this exercise, you'll have a chance to demonstrate that you can

- choose the appropriate communication methods to communicate a certain message
- match the communication methods to the audience needs they're beneficial for
- identify the changes you would make to an e-mail to make it more effective
- match guidelines for face-to-face communication with the aspects of communication they most closely represent
- identify the correct order of steps to take in providing someone with feedback, and
- recognize what to do when the person to whom you're giving feedback gets emotional

## 2. Making "how" match "why"

### Question

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You are the quality control manager at an online gourmet food company with many offices and warehouses in different locations. You need to provide staff with detailed information about food-handling procedures. These procedures, which adhere to strict food-safety standards, have been signed off.

In what ways might you provide this information?

### Options:

1. A phone call to all personnel
2. A face-to-face meeting with personnel in which you invite them to have a discussion
3. A training video on the company intranet illustrating various food-handling scenarios and procedures
4. A web presentation, attended by all personnel, in which you describe the procedures

5. An e-mail to all customer care personnel containing an attachment with the detailed procedures

#### Answer

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**Option 1:** This option is incorrect. A phone call is not good for passing on procedural information, since you wouldn't be able to provide the necessary detail. Text-based methods are more suitable.

**Option 2:** This option is incorrect. With offices in multiple locations, organizing a face-to-face meeting would be tricky. Also, meetings are best when feedback or influence are your intent, and with procedures already signed off, there is no need for discussion. All you want to do is inform.

**Option 3:** This option is correct. A video is a great way to inform and educate. It's also something you can deliver using social media or the company intranet.

**Option 4:** This option is correct. A presentation is a suitable way to inform people about procedures using visuals and text. You can also make the presentation available to personnel afterwards.

**Option 5:** This option is correct. Procedures can be provided in detailed documents, which personnel can print out and read when they have time. These can be distributed quickly via e-mail.

#### Correct answer(s):

- 3. A training video on the company intranet illustrating various food-handling scenarios and procedures
- 4. A web presentation, attended by all personnel, in which you describe the procedures
- 5. An e-mail to all customer care personnel containing an attachment with the detailed procedures

#### Question

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As QC manager, your day consists of a number of communication activities with different audiences. You choose a different communication method for each one.

Match each communication activity with the communication method that best meets the audience's needs.

#### Options:

- A. Letting an employee know that he is not meeting his workload quota
- B. Initiating a dialogue about food-testing protocols with a QC manager at another site

- C. Motivating QC personnel in your facility to work an extra 30 minutes each day
- D. Providing an updated protocol on calibration of freezers
- E. Inviting feedback on a social evening of go-kart racing

**Targets:**

1. Face-to-face meeting
2. Virtual meeting
3. Group meeting
4. E-mail with attachment
5. A post on the company's social media platform

**Answer**

*A sensitive issue like letting an employee know he's not meeting his quota could lead to an emotional reaction. Privacy is also a consideration. It's always best to deliver a message like this in person, one on one.*

*If the activity holds the possibility of a discussion or dialogue about an issue like protocols, the method needs to allow for that. A virtual meeting, in which the giver and the receiver are "synchronous" and where both verbal and nonverbal language may be used, is suitable.*

*You will be best able to motivate people to work extra hours at a group meeting, using more than just words. Motivation also comes through expression – tone and nuance of speech, body language, and actions.*

*When you want people to remember updated protocols, steps, or guidelines, you should send an e-mail, attaching a memory aid that people can print out.*

*A social event like go-kart racing is more likely to be attended by younger employees. In general, younger workers are quite used to posting comments on social media.*

**Correct answer(s):**

Target 1 = Option A

Target 2 = Option B

Target 3 = Option C

Target 4 = Option D

Target 5 = Option E

**Question**

Access the learning aid [Sample E-mail #3](#) and review the sample e-mail.

What do you need to change to make it more effective?

**Options:**

1. Remove the first paragraph about being annoyed; this is not appropriate in an e-mail
2. Move Maureen to the "To" line and Jason to the "Bcc" line
3. List the key points of the attachment in the e-mail
4. Make the subject line more specific

**Answer**

**Option 1:** This option is correct. Use e-mail for messages without emotional content. It would be more appropriate to simply pass on the protocol and let Maureen know separately in a face-to-face meeting that calibration procedures must be followed.

**Option 2:** This option is incorrect. Since Jason is only meant to be kept informed and no action is required of him, he can be placed in the Cc line. If you can't openly include Maureen in the Cc line, then you should consider sending her a separate e-mail. In fact, since she's responsible, consider speaking to her face-to-face about the seriousness of the situation, and simply pass on the procedure to floor staff.

**Option 3:** This option is incorrect. The second paragraph contains an adequate summary of the attachment.

**Option 4:** This option is correct. The subject "Freezers" does not tell the audience very much about the main point of the e-mail – namely, that you are sending a new procedure.

**Correct answer(s):**

1. Remove the first paragraph about being annoyed; this is not appropriate in an e-mail
4. Make the subject line more specific

**Question**

You have organized a group meeting in which you must motivate QC personnel in your facility to work an extra 30 minutes each day, to cover an unprecedented workload.

Match each activity you engage in with the aspect of communication it represents. Communication aspects may have more than one match.

**Options:**



- A. You decide that you want to inform personnel about the need for the change and influence them to make it
- B. You decide not to use a presentation; instead, you'll engage with the group verbally
- C. You establish with your audience that the point of the meeting is the need to get all hands on deck, and you stay on message
- D. You build trust by inviting people to join you in two-way communication throughout the meeting

**Targets:**

- 1. Planning
- 2. Delivering
- 3. Connecting

**Answer**

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*One of the ground rules of conducting a face-to-face interaction is to be prepared by knowing your intention beforehand – for example, informing workers about the need for a change and influencing them to make the change. In other words, plan. Good planning also includes deciding **how** you'll deliver your message.*

*When you deliver a message, you need to establish with your audience the context and your main point early on and stay focused on your intention. This demonstrates credibility and authenticity.*

*Inviting people to join you in two-way communication, even when you're leading the meeting, is an ideal way to start building trust.*

**Correct answer(s):**

Target 1 = Option A, Option B

Target 2 = Option C

Target 3 = Option D

**Question**

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One of the Quality Control staff who reports to you, Patrick, is falling short of his testing quota and you must provide him with feedback.

Place the things you should say to Patrick in order.

**Options:**

- A. "Patrick, could we have a quick word?"
- B. "You're missing your quota and it's causing a bottleneck."
- C. "I know you're being pulled in different directions, but I notice you don't really plan."
- D. "Suggestion: create a checklist each week and check stuff off."
- E. "What's your take on it? Would you agree you're struggling?"
- F. "How about you create a checklist and get it to me later today?"

## Answer

### Correct answer(s):

#### **"Patrick, could we have a quick word?" is ranked**

The very first thing you should do is invite the person to have a conversation.

#### **"You're missing your quota and it's causing a bottleneck." is ranked**

Second, relate the feedback you're giving to a specific business or workflow problem.

#### **"I know you're being pulled in different directions, but I notice you don't really plan." is ranked**

As a third step, it's up to you to explain, using examples and emotional intelligence, what you observe in Patrick's behavior and why that is problematic or prevents successful results.

#### **"Suggestion: create a checklist each week and check stuff off." is ranked**

Fourth, suggest a solution for Patrick – what you'd like to see him do to correct the issue.

#### **"What's your take on it? Would you agree you're struggling?" is ranked**

As a fifth step, check in with Patrick. You invited him into a conversation so he'd have some say. Check for his understanding and agreement.

#### **"How about you create a checklist and get it to me later today?" is ranked**

Finally, you should finish your feedback by working together on a plan for change.

## Question

After your conversation with Patrick, it's apparent that he has become quite emotional. He is very defensive, saying that it isn't his fault and he has personal issues that are affecting his concentration.

What are appropriate actions to take?

### Options:

1. Give Patrick a quick call to discuss the matter

2. Show empathy, acknowledge the emotion, and "take back" the feedback
3. Treat Patrick with respect and sensitivity
4. Restate the feedback, relating it to a specific workflow issue

#### Answer

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**Option 1:** *This option is incorrect. When emotions come into play, you cannot resort to any other method of communication but face-to-face and interpersonal.*

**Option 2:** *This option is incorrect. Although it's appropriate to show empathy and acknowledge emotions, do not take back valid feedback. Rely on the process to help guide you through the conversation and stay true to your intention.*

**Option 3:** *This option is correct. If you treat the recipients of your feedback with respect and sensitivity, they are likely to appreciate your comments, even though they may still become emotional.*

**Option 4:** *This option is correct. Ensure that you and Patrick are clear about the desired behavior change and that you are specific about why the present behavior falls short.*

**Correct answer(s):**

3. Treat Patrick with respect and sensitivity
4. Restate the feedback, relating it to a specific workflow issue