Appendix B

Master Frequently Written Documents

The writing skills addressed in this book can be applied to virtually all types of emails, text messages, and documents used in the business world. Still, you should develop techniques to improve the quality of the text you write most often. In this appendix, you’ll find strategies for writing the following documents along with examples:

performance review

audit report

proposal

email to irritated customer

presentation slides

project status report

press release

LinkedIn profile summary.

Performance Review

If you were asked by a senior executive to summarize one of your direct report’s performance out loud in 30 seconds, your reply might go something like this:

Chung Lee is a hard-working relationship manager whose customer satisfaction ratings topped all his colleagues, but he had an 11 percent error rate on orders (more than the expected 5 percent) and needs to become a better team player.

When writing a performance review, consider starting with the big-picture: Summarize the person’s strengths, challenges, overall performance during the past six to 12 months, and your recommendations. For more negative reviews, however, you may not want to put too much bad news up front.

Many companies require performance evaluators to follow a template and answer specific questions, which can make it difficult to describe certain aspects of the employee’s accomplishments or development opportunities. In those cases, see if you can add an introductory paragraph to sum up the individual’s performance.

See Tool B-1 for two suggested outline options you can use to write performance reviews, which can be modified to fit your company’s template. The sample performance review (Example B-1) uses the second outline option.

Tool B-1

Two Outlines for Performance Reviews

Option 1

Overview: Big picture in two or three sentences

Strengths (goals met or exceeded):

Product knowledge

Customer support interactions

Working with team

Challenges (goals not met):

Product knowledge

Customer support interactions

Working with team

Recommendations: performance improvement plan, training, promotion, and so forth

Option 2

Overview: Big picture in two or three sentences

Product knowledge:

Strengths

Challenges

Phone skills:

Strengths

Challenges

Working with team:

Strengths

Challenges

Recommendations: performance improvement plan, training, promotion, and so forth

Example B-1

Sample Performance Review Using Option Two

Employee: Carmella Rojas, account representative

Performance period: October 15, 2016, to October 15, 2017

Overview

A hard-working account representative, Carmella Rojas consistently handles more phone calls than required and scores high on customer service. Carmella has demonstrated an ability to grasp personal lines products, but has difficulty understanding commercial lines products. To be promoted to the next level, she needs to improve her commercial lines knowledge and spend more time helping colleagues to show that she’s a team player.

The first paragraph sums up the employee’s performance over the past 12 months.

Product Knowledge

Strengths

With two years’ experience with auto, home, and fire insurance, Carmella has an intimate knowledge of all personal lines products, and has learned the new provisions as they’ve been introduced.

Challenges

Carmella has struggled to understand commercial lines because she lacks experience with these policies. The few customer complaints against her have concerned commercial lines. She needs to spend more time learning these products.

Phone Skills

Strengths

Over the past 12 months, Carmella has handled an average of 15 percent more calls than required for this position. Plus, her customer service rating has been 8 of 10 or higher for the entire period. In that time, only two official customer complaints have been filed against her, the lowest number received for any member of the team.

Challenges

The only area in which Carmella needs to improve is explaining commercial lines products. She often speaks too quickly to customers—perhaps to hide her uncertainty—and some people have called or emailed to request clarification.

Working With a Team

Strengths

Many less-experienced account representatives have a better grasp of personal lines policies thanks to Carmella’s coaching and willingness to answer their questions.

Challenges

Carmella tends to help others on her team only when asked. She should be reaching out to other account representatives more often, letting them know she’s available to help. Given her extensive product knowledge, she could be a far greater asset to the rest of the team.

Each of the three performance categories is divided into Strengths and Challenges.

Recommendations

Carmella Rojas, who has proven to be an asset to the team, could be ready for a promotion within the next six months. Over the next three months, she should complete the team dynamics course, which can teach her the keys to working better with team members. Plus, she should attend the weekly sales meeting whenever a commercial lines product is addressed. If Carmella demonstrates significant improvement as a team player in commercial lines after completing these steps, she should be promoted to account manager.

This section provides Carmella with specific next steps and how she could be promoted.

Audit Report

Audit reports are prepared in many different fields, including accounting, pharmaceuticals, and manufacturing. An effective audit report should first state the purpose of the audit and the most pertinent conclusion to immediately convey the general outcome. Then the report should explain all facets of the audit in a logical sequence, including details of the process.

It also may include lists, such as people interviewed, key observations, and the supporting documents attached. The product-specific audit for a contract supplier presented in Example B-2 suggests specific sections that might be applicable to audits in your organization. See how the specific topics are separated into clearly organized paragraphs and defined with descriptive subheads.

Example B-2

External Audit for XY Company’s Qualifications as Packaging Operation for Product Z

Purpose

This audit was conducted to assess the capability of XY Company to perform labeling, secondary packaging, and distribution of Product Z, especially regarding the control of supplies from start to finish.

Conclusion

XY Company is qualified to perform labeling, secondary packaging, and distribution of Product Z.

With the purpose and conclusion up front, the reader immediately grasps the big picture.

General Methods

A three-person team conducted the audit through conference room discussions, interviews with employees, and reviews of selected documentation in relevant areas.

Location

The audit was conducted at the XY Company’s Portland, Maine, facility, a 110,000-square-foot building devoted to primary and secondary blister packaging.

Summary of Findings

The packaging areas were neat, clean, and well organized, which promoted a smooth, well-run operation.

The receiving area was congested because of the high volume of material received.

The quick snapshot of the two findings prepares the reader for the following further details.

Specific Findings

1. Receipt and storage areas: Materials received are hand-recorded on receiving documents, transferred to a computerized quality inventory system, and inspected. XY Company is constructing a self-contained sampling booth for raw materials. Once checked, the materials are moved to a staging corridor and held until ready for processing. The corridor was well organized, except for a few partially broken pallets not properly aligned in the racks.

Observation A: One end of each storage rack is identified by a number (for example, C203) and the other end is identified with the same number. The pallet spaces between are designated C203A, C203B, C203C, and so forth, but are not labeled as such. That could result in an improper pallet being pulled from the racks.

Observation B: Package inserts are commingled in the storage area with general packaging materials, a procedure not recognized as an industry standard.

2. Manufacturing, in-process storage, and warehouse areas: The manufacturing areas were neat and clean, efficient, and optimized for work flow. The movement of materials was well orchestrated and performed in a manner that suggested it was well controlled. The primary packaging areas were self-contained and meticulously clean. Because of space constraints, finished products were staged in the warehouse area and then moved to the off-site warehouse, where they awaited final disposition.

Recommendations

Maintain a person in the plant during all packaging operations.

Review and sign master packaging record.

Review and accept each batch production record.

Review and accept all deviations that may occur during packaging.

The four recommendations are presented with bullet points rather than with numerals because they don’t need to be completed in a particular sequence.

Business Proposal

To get prospects to hire your firm, to get supervisors or colleagues to approve your plan, or to get others to say yes to any initiative, you need to hook them right away. Begin proposals with a concise, convincing argument on why the readers should embrace your ideas—focusing them on your mode of reasoning and enticing them to review the entire document. With new business proposals, the opening should reflect the prospect’s needs (rather than your skills) and offer ways your company can satisfy these needs.

The rest of the proposal should elaborate on what you’ve addressed in the opening, presented in a logical sequence. You should also write a compelling title, a task that’s often easier to do after you’ve drafted some or all of the document.

For a new business proposal, sections could include objectives, target audiences, strategies, and tactics (see Example B-3). Note that other parts of a typical proposal (such as budget, timeline, and the firm’s qualifications) haven’t been included.

Example B-3

New Business Proposal

Powerful, Consistent Messages to Build the Indiana Association of Working Professionals (IAWP) Brand

The title conveys the key concept: powerful, consistent messages.

Overview: Consistent Messages to Build Visibility

To help IAWP build its brand, increase membership, and drive its legislative agenda, GXX Partners can develop compelling messages that highlight the critical value it offers members. GXX, with a track record in helping associations achieve their communication goals, can craft a series of powerful messages targeted to members, prospects, legislators, and other key audiences.

These messages will include how IAWP’s educational programs enhance management abilities, how supporting IAWP’s legislative initiatives can improve a company’s bottom line, and how networking at IAWP can generate new business leads.

The opening introduces the primary idea—compelling messages that highlight the association’s value—and states why GXX can produce the desired results.

Goals

Build IAWP’s brand as the voice of the industry.

Help recruit more members.

Demonstrate the value of IAWP membership, such as educational programs, a voice with the state legislature, updates on industry trends, and discounts on various services.

Support IAWP’s legislative agenda.

Target Audiences

Current and prospective IAWP members

Key legislators

Other key Indiana business leaders and organizations

Key Indiana media

Strategy: Reshape Messages to Address “What’s in It for Me?”

The key to achieving the objectives is composing clear and powerful messages that convey the value that IAWP offers. GXX will guide IAWP in reshaping messages so they speak directly to the audience’s needs. Although IAWP has been promoting member benefits for many years, its messages to explain them need to better answer the question, “What’s in it for me?”

Among the potential messages:

IAWP’s programs help you improve management skills and grow your business.

IAWP’s member benefits, including shipping discounts, offer bottom-line savings.

IAWP’s job retraining programs serve an essential role in the business community.

The strategy explains the key idea: reshaping IAWP’s messages.

Tactics: Deliver Consistent Messages Through Many Vehicles

To deliver its messages effectively, IAWP should incorporate several tactics. These could include e-newsletters, monthly email blasts, an expanded social media presence, and mobile ads. These vehicles would work together to deliver the association’s messages consistently.

This section describes the means for implementing the strategy.

Email to Irritated Customer

Even if all aspects of your company run perfectly, customers will get upset from time to time. Maybe the product they bought is defective, they’ve been charged an amount they don’t think is justified, your customer service reps haven’t returned their emails, or there was a delay in promised service. It doesn’t matter if these issues are real or perceived; the customer must be reassured and satisfied.

The language you use in replying to a customer or business client will go a long way in building loyalty and determining how your organization is perceived in the marketplace. (See step 6 for more about setting the right tone.) This is especially critical today when negative reviews on the growing number of online consumer forums can quickly damage your reputation—and your bottom line. Tool B-2 offers suggestions on correspondence with customers who are annoyed with the company. And see Example B-4 for these tips in action.

Tool B-2

Tips for Writing to Unhappy Customers

Address the customer’s specific complaint instead of offering a canned response that comes across as phony and insincere.

If your firm has made a mistake, admit it without making excuses, and empathize with the inconvenience that was caused.

Don’t patronize the customer with trite language such as, “At XZ Company, we love all our loyal customers.”

If the customer is wrong, don’t insult their intelligence or motives. Point out how the individual could have thought they were right and the company was wrong and carefully lay out the facts of the disputed matter.

Research what you can offer and explain it in your reply. This could include a gift card, a discount coupon, or free delivery on upcoming orders.

Provide the customer with a quick and painless way to contact you, such as a direct email, a direct phone line, or cell number to text you.

Example B-4

Email to Irritated Customer

Dear Ms. Santana,

We apologize that your refrigerator was delivered six hours late—no customer should be inconvenienced to that degree. To help make up for our mistake, we’ve enclosed a $50 gift card that can be used anywhere.

The opening empathizes with Ms. Santana without patronizing her and immediately offers a makeup gift.

We also understand your disappointment in being charged a $75 delivery fee when you expected it to be free. While you’re correct that this offer was good on orders processed through June 30 (and yours was placed June 22), the free delivery was limited to homes within a 20-mile radius of our location. Your house is 32 miles from our store. We understand how easily you could’ve misunderstood the terms of our offer—as did several other customers. So we’ll be sure to clarify our upcoming promotions. Plus, we’ve enclosed a 20-percent-off coupon for any item in our store, valid for 12 months.

This paragraph again empathizes with her about the unexpected delivery fee and explains the terms of the offer without insulting her intelligence, underscored by the fact that other customers have made the same mistake.

Thanks for being our customer, and we hope you’ll continue purchasing our products and give us the opportunity to improve our service to you in the future. Please feel free to call me on my direct line (888.555.6349).

The closing makes a genuine appeal to the customer to continue shopping at the store and offers an easy method of contact.

Sincerely,

Latisha Freemont, Senior Account Manager

Presentation Slides

You may have heard the expression “death by PowerPoint,” referring to agonizingly boring presentations by speakers who clog the screen with too much text and put their audiences to sleep. But PowerPoint (and similar presentation programs) is a valuable communication tool that’s gotten a bad rap thanks to its widespread misuse.

While tools such as graphs, music, videos, and animated visuals can enhance the effectiveness of a presentation, the following tips focus primarily on composing the text while including some basic layout guidelines. Use them as your speaking outline to keep yourself on track and to keep your audience centered on what you’re saying. Don’t write every word you plan to say on the slide; otherwise, your audience will tune you out and read ahead on the slides.

Compare the following three pairs of slides that comprise a marketing proposal. The first entry in each pair is too word heavy; the second entry pares down the text to its memorable points.

|  |  |  |
| --- | --- | --- |
|  | Wordy | Concise |
| Example 1 | Marketing Objectives  We need to achieve a 15 percent higher market share.  We should be able to generate 500 more leads by targeting the energy sector.  We can expand our reach in the Southeast region. | Marketing Objectives  15 percent more market share  500 more leads in energy sector  Expanded reach in Southeast |
| Example 2 | Tactics  Write and distribute email blasts to our database of clients and prospects in the Southeast region.  Implement SEO targeted to key cities in the Southeast.  Develop banner ads to post on key websites read by those in the energy sector. | Tactics  Email blasts: clients and prospects in Southeast  SEO: key Southeast cities  Banner ads: energy sector sites |
| Example 3 | Next Steps  Conduct a brainstorming session to help develop key concepts to deliver our messages.  Instruct creative team to produce banner ad campaigns to present to us for evaluation.  Develop copy for the email blasts and the SEO campaign for our review. | Next Steps  Brainstorm banner ad concepts.  Create banner ad campaigns.  Write email and SEO copy. |

See Tool B-3 for best practices in developing slides.

Tool B-3

Tips for Creating Effective Slides

Slides should be the ideal complement to your presentation if they’re created in an appealing and easy-to-follow way.

Text

Use short phrases and sentences instead of long sentences.

Use a consistent, parallel structure within each slide, such as by making each line a command or a question.

To save space:

Omit short words like the, in, and of whenever possible.

Abbreviate; for example “Feb.” for “February” and “TBD for “to be decided.”

Replace “and” with an ampersand (&).

Replace words with colons, dashes, or slashes; for example, instead of “Mobile marketing for new health app,” write “Mobile marketing: new health app.”

Layout

Don’t clutter a slide with too much text; write no more than six or seven lines.

For headlines, use 36-point type or larger; for text, use 24-point type or larger.

Stick to one or two typefaces.

Minimize the amount of text you put in all caps because it’s more difficult to read.

Frequently use bullets or numerals to group items.

Choose combinations of background and text color that are easiest to read.

Test the readability of your slides by projecting them on a screen and moving far enough away to simulate viewing from the back of the room where you’ll be presenting.

Project Status Report

While the content and format of status reports can vary significantly, virtually all are designed to provide a quick snapshot of an upcoming, ongoing, or future project. The report should help your management team make better decisions about the direction of the project. It may be submitted as a word processing or spreadsheet document (sometimes in a template) or within the text of an email.

Your report needs to demonstrate that you understand all aspects of the project through a concise, well-organized document, which, if necessary, should include recommended solutions to key problems. Still, there should be no surprises, because this is not the place to share bad news for the first time.

Here are guidelines for an effective status report, which can be applied to many different types of projects. These guidelines came with the assistance of Elizabeth Harrin, director, Otobos Consultants, and project management specialist.

Start With the Big Picture

If readers aren’t aware of the project’s context, explain the project in a nutshell. This two- or three-sentence description could include the scope, objectives, challenges, and other key information. Call it an executive summary, project overview, or other appropriate name. If your report goes to people who know the project well and who want a progress update, begin with a summary of major points from that reporting period before going into detail.

Consider Your Audience

What do your readers want to know about the project? For example, with projects on a tight budget, your manager might want an update on how much has been spent thus far and anticipated expenditures going forward. If it’s critical that you hit a certain launch date, explain whether you’re still on track to meet the deadline. Don’t be afraid to tailor your report for the people receiving it.

Discuss Results Rather Than Activities

Nobody wants to plow through every last detail of what you did. Focus on major achievements and the business implications. Mention if you’re deviating from your original plans, such as delivering something early or shifting tasks around, and explain how upcoming milestones or deadlines will change.

Highlight Action Items

Call attention to decisions you’re awaiting from management. Explain what you’re doing to manage risks and issues on the project.

Divide the Report Into Logical Sections

Depending on the subject matter and your company’s format, create sections that flow logically from start to finish. Here’s one way to outline a project status report:

Executive summary

Work completed

Work in progress

Work to be completed

Issues and recommended solutions

Actions and decisions required

See Example B-5 for a typical project status report.

Example B-5

Project Status Report on Construction of New Warehouse

Project Status Report: Construction of Sutton Street Warehouse

Date: January 16

Executive Summary

The construction of a 96’ x 144’ warehouse on Sutton Street to store raw materials (approved October 9 with expected completion June 4) is on schedule and proceeding smoothly. The biggest challenge is an unanticipated rise in the cost of materials from the plumbing contractor, for which we’ve reached a temporary agreement so work won’t be delayed. We’re currently negotiating a long-term solution.

The opening gives a quick overview about the project, including start and completion dates and the major obstacle thus far.

Work Completed

Plans approved by the county Department of Development and Permits (Nov. 12)

Lines laid out by plumbing and electrical contractors (Dec. 2)

Foundation poured (Dec. 10)

Work in Progress (with expected completion dates)

Installation of high-level lighting, socket outlets, and alarm systems (Jan. 24)

Construction of building exterior, including metal roofing and prefinished walls (Feb. 7)

Installation of sprinkler system (March 2)

Work to Be Completed (with targeted completion dates)

Install sanitary piping, plumbing fixtures, and energy-efficient HVAC unit (March 29).

Install epoxy floor system (April 3).

Paint the interior (April 10).

Install storage rack system (April 26).

Secure certificate of occupancy from county building inspector (May 6).

Each task is listed with dates in chronological order to make it easy for the reader to follow.

Issues and Recommended Solutions

Issue 1: XCX Plumbing increased materials costs 15 percent, effective January 1, after Procurement had apparently signed an agreement October 11 with last year’s pricing. But a closer review of the contract language revealed that pricing terms were unclear.

Recommendation: Accept the price increase if XCX agrees to provide six months of service (instead of the typical three months) at no charge. Given our anticipated spending for service in that period, we should, at worst, break even.

Issue 2: ZD Floor Coatings notified us that the delivery of the epoxy floors in our preferred color scheme wouldn’t arrive until April 15, too late to keep this project on track.

Recommendation: Instruct ZD to order a comparable color scheme that we’ve already approved and which ZD guaranteed would arrive by March 28.

The two issues are concisely explained and followed by a specific recommendation, demonstrating that the writer is in control of the project.

Actions and Decisions Required

Approve our recommended agreement negotiated with XCX Plumbing.

Confirm that we can order the epoxy floor in the new color scheme from ZD Floor Coatings.

Select either multitier racking or pallet racking (see links to photos, specifications, and price comparisons).

Choose a two-color paint scheme for the interior walls (see link to five potential combinations).

Press Release

Despite the social media revolution that continues to transform the practice of public relations, the press release remains one of the most important vehicles for delivering messages. And, with the proliferation of sites such as LinkedIn, Facebook, Twitter, and others, most press releases reach a larger audience of not only media members but also consumers and other end users. So if you’re a PR practitioner or play a role in promoting your company, you should know how to craft effective press releases that support your organization’s communication.

Your toughest challenge with any press release is getting past the gatekeeper—newspaper editors, TV producers, bloggers. These individuals, often swamped with more than 100 releases a day, select only a small percentage of them to use in some way, such as to generate a major story, to include a portion in a publication or website, or mention on the air. The rest of the press releases are rejected for a variety of reasons: irrelevant to their audience, lack of news value, too much hype, bland text, poorly written, and more. The winners that rise to the top in are the concise, organized, and well-written releases that convey their major news in the headline and lead, and that flesh out the story in brief paragraphs arranged in a logical sequence.

Before you get past the gatekeeper, you need to get to them in the first place with a captivating headline (often in the subject line) and a compelling lead. As one editor told me, “If the copy doesn’t excite me in the first 20 words, I won’t read the rest of it.” And he wasn’t kidding.

One way to write gripping headlines and leads is to look beyond the obvious facts about your product, service, event, or issue to uncover its most significant news value. Let’s look at some techniques for creating newsworthy headlines and leads.

Captivating Headlines

Visualize how the story you want to tell would come across in one of your targeted newspapers, magazines, TV broadcasts, blogs, or other channels. Then craft a headline that grabs their attention and intrigues the individual enough to continue reading.

Compare these two headlines:

ZY’s Q3 Profits Increase 10%, CEO Cites “New Opportunities” for Growth

ZY Profit Up 10%: 75 New Hires by May 1

Compelling Lead

Whereas the headline grabs attention and sometimes actually conveys news (as in the previous headline example), the lead (that is, the first paragraph) summarizes the primary news. Compare these two leads:

A new, state-of-the-art database management software program is now available from ZXX, according to an announcement made today. The software uses revolutionary data-mining technology developed after years of research by ZXX’s R&D team. The software, developed to meet the needs of small businesses, permits the tracking of leads five times faster than previous packages.

ZXX’s new database management software enables small businesses to track leads five times faster than previous packages.

That first lead uses clichés like state-of-the-art and revolutionary—turnoffs to editors, and even consumers tired of reading fluff. Plus, the most important news—faster lead tracking—isn’t mentioned until the third sentence. By that time, most editors, producers, and bloggers have moved on to the next release.

The second lead gets to the point much faster. In one sentence, it explains the software’s benefit to small businesses—and it does that without over-the-top language.

Well-Organized Body

The body of the press release should build on the message in the headline and led. Using the example of ZXX, the next few paragraphs would explain why the software was developed, how it works, and how other small businesses have used it successfully.

A quote from the CEO or spokesperson offers a personal touch to the release and adds key information. Avoid quotes that simply repeat what’s already been stated or that talk about the company’s excitement, such as, “We’re thrilled to offer this new product.” Nobody cares! Instead, use quotes to further your message, such as by additional explanations of how the product benefits users.

Today, the format of a release can vary significantly; some have less text and include a list of links to images, videos, and key landing pages. Plus, some releases are further shortened to fit into a particular social media channel. Example B-6, a press release from a developer of a nutrition app, includes links to its website and logo.

Example B-6

Press Release on INRFOOD Nutrition App

INRFOOD Offers More Personalized Nutrition With New Free Mobile App

Headline conveys news about the free app, incorporating the broader story of personalized nutrition, which could intrigue the media.

TROPHY CLUB, Texas—INRFOOD (www.inrfood.com) has launched a free customizable mobile app that gives people control over their nutrition, using information on what goes into their food and how diet affects their health. The app features an assortment of practical tools including calorie counting and ingredient analysis.

Concise led expands on the headline’s personalized nutrition message and explains benefits of the app.

Founder and CEO Don O’Brien believes everyone deserves to know what's in their food. "Our motto is 'Trust What You Eat,' but that's difficult because the industrialized food system is more chemistry than biology, and many products have numerous additives. INRFOOD is spurring a grassroots nutrition revolution that's calling for more transparency in foods and ingredients."

CEO’s quote advances the story by discussing the difficulty of knowing what’s in our foods and the movement toward transparency with ingredients.

Dietary guidance too often focuses on calories or carbs to the exclusion of micronutrients and other ingredients that are just as, if not more, important. The INRFOOD app makes deciphering these variables tremendously simple, bringing transparency to a complex topic.

The app's foundation is a growing database of more than 750,000 foods and 15,000 ingredients. Unlike one-size-fits-all nutrition labels, the app creates unique labels based on individual preferences: An endurance athlete and an office worker will obviously have different needs. Simple color coding and personalized alerts based on specific ingredients are further examples of the app adapting to the user, rather than the other way around.

The chance to discover delicious, healthy food and meal ideas is another key benefit of the app. It lets users see what others with similar nutrition profiles have been eating.

The INRFOOD app has been two years in the making. The development team's vision is a nutrition solution for every scenario—athletes, pregnant women, vegetarians, vegans, and so on. In the coming months, the team will be announcing new features and tools to bring this vision closer to reality.

O’Brien concluded, "To bring change to the food system, we need to empower people to make better food choices. A change in demand will accelerate this new food revolution. We plan on being the bridge to connect our community with all the best food choices available. Together with the user community, we can revolutionize our food and in turn, change everyone's lives for the better."

The app is available in the iTunes store. Visit www.inrfood.com for more info.

Five paragraphs offer additional relevant information about how the app is used and its potential impact. They’re followed by another link to the company website and to the iTunes app store.

About INRFOOD

INRFOOD transforms lives with complete health and wellness in mind. It simplifies the complexities of nutrition with personalized alerts and recommendations. Instead of just counting calories, its app focuses on a bottom-up approach through analysis of food’s core components—its ingredients. The goal is to empower consumers to make better-informed dietary decisions specifically for their needs.

Contact:

Don O’Brien CEO

573.873.6631

dobrien@inrfood.com

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LinkedIn Profile Summary

Whether you’re a business owner, consultant, executive, elected official, or job searcher, your LinkedIn profile is your most important personal branding tool. You can showcase your talents, accomplishments, connections, business philosophy, and more. And you can express your personality and tell your story, so prospects, employers, partners, and others will view you as the “right fit.”

Search online and you’ll find advice galore on how to create a “killer LinkedIn profile,” much of which doesn’t fit your requirements or style. At the same time, you can also find many prudent suggestions for incorporating key images and videos, featuring successful projects, highlighting relevant testimonials, mentioning your LinkedIn groups, optimizing for mobile users, and more. For this discussion, we’ll stick to strategies for writing your heading and summary—what readers see first.

While you can take many different approaches to creating an effective LinkedIn profile, your text should adhere to a few key principles that will increase the likelihood of connecting with the right person or organization.

Clarify Audience, Purpose, and Strategy

Be clear about who you’re targeting, for what purpose, and the most pertinent message to attract attention. For example, if you’re an internal auditor looking for a position at a large organization, your strategy might be to highlight your accomplishments, such as developing a cost-effective audit report process at a major corporation.

Craft Captivating Headings

Entice your target audience with a heading that immediately conveys your value and intrigues readers to find out what you can offer. Consider using multiple headings separated by one or more vertical bars (|). See these examples of engaging headings:

PMP-certified project manager who has led multimillion-dollar projects worldwide.

After realizing I couldn’t act for a living, I set the stage for hundreds of high-achieving businesswomen.

Don’t Be Afraid to “Let Go”

Unlike a résumé, with limited space and common standards to follow, a LinkedIn profile allows you to be unconventional in your content and style—as long as you keep it professional. You could recap your work history with a humorous overtone. Or you could tell the story about an unusual event or circumstance that transformed your career. You could even use a whacky analogy to bring attention to your skills or to explain your strategy for solving a business problem.

Be sure that your content and linguistic devices relate to your core message, as in this heading: Copywriter who crafts web content that goes viral. And you won’t beat me at Scrabble! The reference to Scrabble is ideal for a copywriter, who wants to be viewed as a wordsmith.

For some of you, this let-your-hair-down approach won’t be appropriate. Maybe you work in a traditional industry like law, banking, or insurance. Or you’re more comfortable talking about yourself in a straightforward manner. Whatever style you take, draw readers in with a compelling narrative. This could include an in-depth explanation of how your initiatives produced meaningful results, how you empowered direct reports to enhance their performance, what your thoughts on a particular industry issue are, and more.

Make Your Summary Compelling and Substantive

Whether you use a conventional or offbeat approach, your LinkedIn summary needs a powerful and substantive message that increases the likelihood that your targeted audiences will want to connect with you. Build on the message in your heading. For example, as a human resource executive, your heading may read, Helping international companies optimize employee performance. Then your summary could offer examples of initiatives in which you maximized performance, ideally with metrics. You could also incorporate a story of how you resolved a difficult problem involving individuals from different countries whose cultures had clashed. Plus, you could cite a flattering and telling testimonial from a C-Suite executive.

Consider your LinkedIn profile summary as an extended elevator speech—which doesn’t need to be rushed through in 60 seconds like at a networking event. Use this section to communicate your most important assets and your beliefs about your profession or industry. Although your text can go on and on, write summaries that are explicit and concise (see step 2) to holds readers’ attention. And recognize that many people won’t bother reading any more of your profile.

See Example B-7, in which a marketing agency owner entices readers with an intriguing heading, followed by an offbeat presentation of her story, a synopsis of her experience and talents, and her approach to serving clients.

Example B-7

LinkedIn Profile Summary

Anne Marie (Kerr) Holder

CEO/Client Expectations Optimizer + Brand Strategist + Advertising Agency Owner + PR Professional + Marketing Expert

SPARK Strategic Ideas

UNC Kenan-Flagler Business School

Heading conveys Anne Marie’s broad expertise, including her ability to optimize a client’s expectations.

“Girl spends 10 years in big ad agencies. Earns her badges. Inhales a lot of smoke. So, she takes to the hills (Chapel Hill) and comes down knowing there is a smarter way to build it. With better tools, she sees the value in a lighter backpack. Fresh kindling. Same passion. And so it began. SPARK. Then she became we, and grew to a troop. Strategic. Agile. Smart cookies.”

Her story, told in the third person with staccato-like sentences, reveals a bit about Anne Marie’s personality and style, enticing the reader to learn more.

That’s the fun way the SPARK website (sparksi.com) describes my journey. I got my start working for Charlotte ad agencies, working up to managing a $13 million account. Eventually, I realized that I had built a strong set of skills around advertising, public relations, and marketing, but I also recognized I had a lot of questions about the broader business world. My hunger for knowledge felt limited in the agency environment so I set off to discover more about the business world and myself.

While working full time, I spent almost two years in an intensive executive MBA weekend program at the Kenan-Flagler School of Business. The program changed my very essence—teaching me to ask different questions, view things from all angles, and challenge assumptions. As it turned out, I have a talent for business strategy and really enjoy being able to combine strategic business planning with communications. I also knew there was a way to improve the traditional agency model, introduce transparency, and create an environment that nurtured employees with stronger results for our clients.

In 2008, I got the courage to ignite my passion and launch SPARK Strategic Ideas. It’s been a wild ride, but it is incredibly gratifying to come to work every day, surrounded by a family of employees who love what they do and to know that every day, we make a difference. We are great at growing businesses. And when we grow a business, that business can hire more people. That changes lives. And in some small way, we change the world. Sometimes, it only takes a SPARK.

The next three paragraphs build on the charming opening, taking us through Anne Marie’s steps to create a successful agency, culminating with a clever play on words with the company name.