Organize to Promote Understanding

Step 4

Overview

Start with the bottom line to hook readers.

Separate ideas into manageable chunks.

Create effective bulleted and numbered lists.

Choose the best method to organize your document.

Produce visually appealing text.

Even if your email or document is clear, concise, and explicit with a natural rhythm, you won’t hold readers’ attention and get them to embrace your ideas without a logical and coherent structure. In plain language, it needs to be well organized.

You may want to start by training your mind to select and differentiate bits of information when you hear or read them. Before you begin writing, jot down the key ideas you need to get across. If you’ve started with a freewriting exercise, go through your first draft, pick out your key points, and move them around to create order (see the outlines discussed in step 1).

In this step, we’ll discuss essential strategies for creating a cohesive document. When you get used to applying these techniques, you’ll find that writing in an organized fashion will become a more instinctive process.

Start With the Bottom Line

If you’re reading a novel, you wouldn’t want the author to reveal the climax at the beginning or even the middle of the story. But in the business environment, nobody has the patience to plow through paragraph after paragraph to find the key message. Most readers want the bottom line immediately.

Journalists, having always recognized the urgency of enticing readers, routinely organize their stories to open with compelling leads that capture your attention. On the front page of the print or online versions of daily newspapers throughout the country, you’ll find this type of one-sentence summary of a story:

ABC Industries rejected a $2 billion takeover offer from rival YZ Company, pointing to antitrust concerns, and reaffirmed its support for its deal with XA Partners.

No wasted words here. Notice the strong verbs like rejected, pointing, and reaffirmed. In a single sentence, the writer has summed up the key news, grabbed your attention, and enticed you to read the entire article.

Though you’re probably not a journalist, you still want to capture the attention of supervisors, co-workers, clients, and others, most of whom are extremely busy. So use the same strategy: bottom-line your message, as with this sample first sentence:

Given the latest data, your team needs to increase productivity at least 20 percent by the beginning of next year.

Now you’ve hooked the reader, who is compelled to continue reading your email and figure out how to become more efficient and increase productivity. The next sentence might direct readers to the specific strategies to achieve this objective:

My recommendations:

Assess the six-month performance of each of your subordinates.

Determine whether some employees need to shift to responsibilities better suited to them.

Consider hiring an experienced assistant manager.

You can use several approaches in the first paragraph to draw readers in. Typically, an introductory paragraph conveys one or more of these items:

purpose

situation or problem

action required

benefits for the reader

anticipated bottom line.

For example, this introductory paragraph conveys the report’s purpose and the action required:

Our account reps have been underappreciated since I was hired three years ago. This report will explain how management overlooks their needs, why their training is inadequate, and the recommended steps to correct this injustice.

Here’s an opener that presents both the problem and the action required:

The annual conference is less than four months away, and we still don’t have budgets, sales goals, sponsorship packages, or travel plans. Each of you must give me this information for your division by July 10. Please follow the guidelines outlined below.

This opener explains the problem of declining sales and clearly spells out how to reverse this trend:

The 15 percent reduction in sales of building materials during the third quarter was due to the slowdown in new construction, colder-than-normal weather, and the lack of repeat sales among longtime customers. To get our numbers back up to second-quarter levels of higher, we need to expand our market geographically, better train the sales force, and increase email marketing by 25 percent.

In the opening of this email, the first few words tell the readers what they’ll gain from taking the requested action:

To help you and other line managers work more efficiently, we’ve retained a management consulting firm specializing in time management. On October 11, we’ll start offering online tutorials. Don’t miss this opportunity to increase your productivity. Below are the schedule and registration instructions.

Separate Your Ideas

One of the most frequent organizing mistakes business writers make is scattering information randomly throughout the text instead of dividing it into single-point paragraphs and sections. The challenge is to not automatically present ideas the same way you processed them, either from another source or from your own mind—because they probably won’t be in a logical order.

Pointer

Each paragraph or section should address only one idea.<end>

For example, when writing a review of a recent meeting or an industry analysis based on the latest trends, you shouldn’t just spew out fact after fact. Sort the information and separate it into chunks—typically with one idea per paragraph or one idea per section. This chunking process makes it much easier for you to put the material into proper context and increases the likelihood that the reader will stick with your text and understand it.

Let’s look at some examples. In the following email, the writer has scattered her ideas all over the place:

Ming,

Thanks for your input in this morning’s extremely productive breakfast meeting. Following is a review of the key points we discussed.

I’m excited about your aggressive sales goals for the next year. Plus, I agree that overall customer service needs to be improved.

We’ll be able to talk about these issues during the 30-minute biweekly conference calls we’ll set up, which we’ll start on February 6. From our end, our biggest challenge to improve customer service is changing the attitudes of our phone reps, who don’t give your customers the time they need to resolve their issues. Starting January 15, all service reps will undergo a three-month online training that will address attitudes and the need to understand your mission to exceed customers’ expectations.

All customer issues should also be discussed on that first call, especially the report on customer surveys that have labeled our reps surly, rude, and curt. The calls also will enable your team leaders to get acquainted with our customer service managers. Again, our company is doing everything possible to help you achieve these goals cost-effectively. You’ll get a cost estimate by January 30, so we can move forward as soon as possible.

Please contact me if you have any questions.

Regards,

Paula

If we reorganize that confusing message by separating the ideas into distinct paragraphs, we produce a much more readable email:

Ming,

Thanks for your input in this morning’s extremely productive breakfast meeting. Following is a review of the key points we discussed.

First, I’m excited about your aggressive sales goals for the next year, and we’re committed to helping you reach your goals. Doing so will take additional staffing on our end. I’ll see that you get a cost estimate by January 30 so we can move forward as soon as possible. Our company is doing everything we can to help you achieve your goals cost-effectively.

Second, we agree that customer service needs to be improved. This requires changing the attitudes of our phone reps, who don’t give your customers the time they need to resolve their issues. In customer surveys, our reps have been labeled surly, rude, and curt. Starting January 15, all service reps will undergo a three-month online training that will address attitudes and the need to achieve your mission of exceeding customers’ expectations.

Third, the biweekly conference calls will be critical in addressing all service issues and will enable your team leaders to get acquainted with our customer service managers. We’ll schedule 30-minute calls every other Wednesday at 8:30 a.m., starting February 6.

Please contact me if you have any questions.

Regards,

Paula

In the revised version, each paragraph addresses a distinct issue, and that makes the information easier for the reader to manage. Notice how each topic sentence sets the tone and establishes the context for the rest of the paragraph:

First, I’m excited about your aggressive sales goals for the next year, and we’re committed to helping you reach your goals.

Second, we agree that customer service needs to be improved.

Third, the biweekly conference calls will be critical in addressing all service issues and will enable your team leaders to get acquainted with our customer service managers.

By starting every section or new paragraph (or group of paragraphs on the same subject) with a topic sentence, you’re informing readers where you’re going.

Use Subheads to Highlight Each Idea

To further separate ideas and clue your readers to where you’re going next, write subheads before each major section. Even in short email messages, subheads can enable readers to grasp your message faster. Plus, subheads eliminate one of the biggest obstacles to readability—the dreaded blob of text.

Pointer

Use subheads that are explicitly related to the topic to draw your readers to your message.

Take some time to read this paragraph:

I have several suggestions for marketing the new line of services over the next 12 months. First, we should place full-page, four-color magazine ads for the entire year in the five most important trade publications, which are all monthlies. Cost: $150,000. Another suggestion is to create a search engine optimization campaign tied to services that appeal to targeted industries. Cost: $50,000. Plus, we should also send three email blasts targeted to all who previously purchased our services or expressed interest in similar services online over the last two years. Cost: $35,000. Let’s not forget traditional direct mail. We should send product flyers to existing customers of all services every other month. Cost: $50,000. And I’d recommend that we schedule four educational breakfast seminars, in March, May, September, and November. We would secure outside speakers and hold the events at upscale venues in the southwest region. Cost: $75,000. Let me know what you think of these ideas so we can move forward.

To the reader, that paragraph is a big blob of dark spots which goes on too long without a break—it’s a turnoff. But inserting subheads to separate the marketing tactics dramatically improves appearance and readability:

I have several suggestions for marketing the new services over the next 12 months:

Magazine ads

Place full-page, four-color magazine ads to run all 12 months in the five most important trade publications. Cost: $150,000.

Search engine optimization

Create a campaign tied to services that appeal to targeted industries. Cost: $50,000.

Email blasts

Send three email blasts to everyone who previously purchased our services or expressed interest in similar services online over the past two years. Cost: $35,000.

Traditional direct mail

Send flyers on all services to existing customers every other month. Cost: $50,000.

Breakfast seminars

Schedule four educational seminars on topics related to our key services, inviting outside speakers, at upscale venues in the southwest region. Cost: $75,000

Let me know what you think of these ideas so we can move forward.

With those subheads, the reader immediately sees the five suggestions and can choose which one to review first. If the reader is already thinking about search engine optimization, they can turn to that category first. For paragraphs or sections with more substantive information, use subheads that are explicit, summarizing the key points conveyed. These act like newspaper headlines that lure readers to your ideas.

For certain documents—such as proposals and reports—consider explicit subheads to increase the likelihood that others will read the sections of the text that follow. As an example, your division head would be more enthused about a paragraph with the subhead, “Mobile marketing can boost leads 35 percent,” than just “Mobile marketing.”

Let’s compare the ordinary and explicit subheads used in a proposal for new security software (Tool 4-1). Whereas the subheads on the left offer a broad overview of the text to follow, the ones on the right specify the key message expressed in that section, enticing readers to learn more. For example, instead of the general subhead “Integration,” the explicit subhead describes the benefit: “Seamlessly integrates with document-management systems.”

Tool 4-1

Ordinary vs. Explicit Subheads in a Proposal for a New Security System

|  |  |
| --- | --- |
| Ordinary | Explicit |
| Security breaches | Number of security breaches doubled in six months |
| Intellectual property | Safeguard intellectual property |
| Software | Software offers security at operating and application levels |
| Valuable data | Prevents unauthorized copying of valuable data |
| Integration | Seamlessly integrates with document-management systems |
| System support | Supports all CAD and business programs |
| Next steps | Approve November 15, install December 1 |

Create Effective Numbered and Bulleted Lists

Most readers find it easier to understand enumerated information—for example, the three marketing objectives, the four action items, the five keys to a successful career. This can be accomplished in paragraph form or broken out into lists (the preferred option today). Here’s a sample of text in which the writer has enumerated his points in paragraph form:

The sales manager outlined three keys to generating new leads. First, establish a robust social media presence. Second, call at least 30 prospects a day. And, third, ask each existing client to refer two prospects.

Here’s the same text with the points broken out into numbered items:

The sales manager outlined three keys to generating new leads:

Establish a robust social media presence.

Call at least 30 prospects a day.

Ask each existing client to refer two prospects.

Use numbers when the sentence that introduces a list cites the number of items in the list (as in the previous example), or when you want to present items in priority or order, as in these instructions:

Here are the next steps for relocating the warehouse from Denver to Colorado Springs:

Inventory all Denver merchandise.

Pack merchandise in boxes.

Get clearance that Colorado Springs is ready for shipment.

Ship all boxes to Colorado Springs.

Inspect merchandise for damage immediately on arrival in Colorado Springs.

When the number or order of items isn’t an issue, use bullets:

In Q2, we’ll need to hire new employees for these departments:

finance

information technology

marketing

purchasing.

Create Subcategories for Long Bulleted Lists

If you’ve ever read an extensive list of bulleted items, you know how difficult it is to take in all the information and how quickly you can lose interest. By dividing the list into categories with simple subheads, you make it much easier for readers to process. See the two following versions:

The marketing team has determined that these products will produce the highest sales margins:

MP3 players

crock posts

motion alarms

LED security lights

keyless entry systems

blenders

video game consoles

indoor electric grills

action cameras

microwave ovens

smart watches.

Now consider this second version, with the 11 products divided into three subcategories:

The marketing team has determined that these products will produce the highest margins:

Personal electronics

action cameras

MP3 players

smart watches

video game consoles.

Kitchen appliances

blenders

crock pots

indoor electric grills

microwave ovens.

Home security

keyless entry systems

LED security lights

motion alarms.

When you believe your bulleted list has too many items for one general category, create logical subcategories to help your readers grasp the message faster.

Frame Bulleted or Numbered Text

Before listing a series of items, frame them to provide clear context (as with the examples in the prior section). Otherwise, readers may be confused about the significance or the action step. Compare these two lead-ins to bulleted text, one vague and one clear:

Our division fell short with managing finances and needs to do better:

fees associated with our three suppliers

ideas for lowering shipping expenses

anticipated raw materials costs for the next 12 months.

This leaves the reader with questions: Has anyone begun working on these tasks? Do you want me to complete them? Will I get any help?

Here’s one way to clarify:

To help our division better manage finances, please email me this information by December 15:

fees associated with our three suppliers

ideas for lowering shipping expenses

anticipated raw materials costs for the next 12 months.

One caveat for numbers and bullets: Use them sparingly. Nobody wants to read page after page of only lists. Intersperse them with paragraph text for maximum impact.

Organize With the Managerial Method

One of the most straightforward, yet powerful, ways to organize information is the managerial method, illustrated by this simple outline:

Overview or summary

Issues

Fact 1

Fact 2

Fact 3

Results and next steps

Let’s apply this method in Example 4-1.

Example 4.1

The Managerial Method in Action

Here’s an example of the managerial method: an email explaining the problems with QV Associates, your company’s marketing agency, during the third quarter.

1. Overview

Several problems have been discovered with QV Associates in Q3, including an underpayment in commission rebate and creative and production costs that exceeded the budget. We need to further review QV’s work so we can determine whether to renew its contract (expires December 15) or find a new agency. Given our excellent relationship over the past five years, we’d prefer to resolve this issue and continue with QV.

2. Issues

Billing and payment errors

Commission rebate: $5,000 (should have been $15,000)

Creative and production costs: $275,000 ($100,000 over the limit)

Additional concerns

Previous overbilling errors

No QV account rep dedicated to our firm

Marketing manager does not understand terms and does not communicate effectively with QV

3. Next steps

We’ll review billings and payments from the past 12 months and talk to key QV people to find out how the errors occurred. Then, assuming we’re confident that the mistakes were due to misunderstandings or oversights, we’ll suggest these changes:

Instruct QV to dedicate one individual as client liaison.

Ensure that our marketing manager understands commissions and rebates.

Have QV schedule a monthly call to review figures.

We’ll set up a conference call on November 20, 3 p.m. PT, with all parties involved.

Consider Other Methods of Organizing

In addition to the managerial method, other approaches may work for certain situations, based on the type of document you’re writing, the content you’ll include, and your personal preference. Common ways of organizing include:

order of importance

time

space

compare and contrast

problem and solution

existing categories.

Organizing by Order of Importance

This approach is similar to the managerial method in that the most important information comes first, followed by the next-most important material, and so on in descending order of significance. It helps ensure that those readers who are too impatient or lazy to read the entire text will at least get to your key points. Journalists call this method the inverted pyramid and have been using it for more than a century to capture readers’ attention.

Among the documents for which this method works are:

proposals

project reports

reports of problems that need to be handled right away

research findings.

Example 4-2 illustrates this organizing approach for a proposal to purchase new software. The example shows the critical points somewhat fleshed out, but not written as they will be in the final document. You also could jot down general descriptions of the points to be covered—these are shown in brackets after each specific point. That approach may be more useful if you’re organizing your document before all the data are collected.

Determining which point is most important is subjective. For the proposal used in Example 4-2, you could argue that the old system’s shortfalls are the most critical information and should be listed before the new software system. Only you know the specific details of your business environment and the personalities and roles of the readers, so use that information to prioritize the points in your document.

Example 4-2

Organizing by Order of Importance

The critical points in a proposal to purchase new software might be organized in this descending order of importance:

new software system would save $250,000 in 12 months [primary benefit to be gained by the purchase]

old system is too slow, has frequent shutdowns, and wastes operator time [primary problems the new software will solve]

new software received excellent reviews in key industry blogs [industry recommendations supporting the new software package]

new system could be installed within two months [installation schedule]

learning and development division could begin online training immediately after installation [training schedule].

Organizing by Time

If your text deals with something that has just occurred or if it seeks suggestions or instructions for the future, let time dictate the organization.

This method works well for these and other types of documents:

incident reports

sales or trend reports

instructions or action plans

company history.

Here’s how organizing by time could work in a report on sales for a calendar year:

First quarter: sluggish sales in 10 of 12 states

Second quarter: telemarketing helps increase sales 10 percent nationwide

Third quarter: outreach to five new districts boosts sales another 8 percent

Fourth quarter: sales drop 5 percent below third-quarter sales after industry consolidation.

With a longer period to cover—say 75 years or more of a company’s history—divide the years based on when events occurred:

1950–58: Mr. and Mrs. Carter form company and build it to 100 people.

1959–71: New owner expands to eight states.

1972–90: Four new divisions form, revenues triple.

1991–present: Merger with ZS Enterprises propels unprecedented growth.

For an action plan, the time-based categories would comprise the next steps in chronological order, with one or more paragraphs of detail after each numbered heading. This method of organizing is illustrated in Example 4-3.

Example 4-3

Organizing Action Plan by Time

If actions are to be taken in a particular order, organizing by time is an effective method. For a document outlining the steps a sales department will take in preparing for and capitalizing on the opportunities offered by an industry trade show, the action plan might be organized like this:

Set sales goals.

Develop traditional and social media marketing plans.

Approve marketing messages.

Get the budget approved.

Handle show logistics.

Attend the show.

Follow up on leads.

Organizing by Space

This method separates information based on different organization charts or geographic spaces, such as units, divisions, departments, regions, and countries. For example, a customer service report might be arranged by service territories:

Mid-Atlantic: New software and training fuel 20 percent hike in customer satisfaction.

Midwest: Departure of division head leads to 10 percent decline in customer satisfaction.

Northwest: Customer satisfaction is down 12 percent after team of inexperienced reps was hired.

Southeast: Service holds steady for third consecutive quarter.

Organizing by Comparison

This technique enables you to compare two or more topics. For example, a report comparing two divisions’ performance in several categories might be organized like this:

Sales: Southeast versus Central

Customer service: Southeast versus Central

Operations: Southeast versus Central

Morale: Southeast versus Central.

As you can see by the example, that arrangement also creates a secondary organizing method (Southeast division followed by Central division), which is particularly useful if your topics are multilayered or complex.

Organizing by Issue and Solution

In its simplest form, this method presents the problem and then the solution. With multiple categories of problems and solutions, you should first determine the order of categories. Then you easily can describe the problem and the solution in each one. Here’s an example that’s arranged by company holdings:

Texas property

problem

solution.

Louisiana property

problem

solution.

Oklahoma property

problem

solution.

The problem–solution method can be modified to a strengths–challenges approach in a performance review, as with this example:

Overview: summary of employee’s performance

Technical skills: strengths and challenges

Phone skills: strengths and challenges

Working with team: strengths and challenges

Individual work habits: strengths and challenges

Recommendations: promotion, probation, more training, more responsibilities.

You also can organize a performance review this way:

Overview

Strengths

technical skills

phone skills

working with team

individual work habits.

Challenges

technical skills

phone skills

working with team

individual work habits.

Recommendations

See more about writing performance reviews in Appendix B.

Organizing by Existing Categories

In some cases, the way you separate and organize information is dictated by natural groups. For example, in the following report, the topics discussed at a marketing meeting form the categories:

new slogan

mobile advertising

email blasts

search engine optimization.

This category-based method also could be used for the different lines of coverage in an insurance company:

liability

workers’ compensation

auto

homeowners

marine.

Which Organizing Method Is Best for Your Document?

If you’re not sure which way to organize your text, begin sorting out the ideas—a process that can help you select the best method or combination of methods. Try these steps:

Identify the key concepts, using any of these means:

Write each idea longhand on a sticky note, index card, or note pad.

Type your ideas in bulleted lists or other groupings.

Create a diagram (using paper or a computer template) with various circles, each with one idea inside.

Use an online brainstorming worksheet to enter your ideas.

Review the ideas and see if you want to add, subtract, or modify any of them.

Move the ideas around until you arrive at a logical order that will suit your readers.

Pointer

Base your choice of organizing method on the message, the content, the readers, and your own style.

In some emails or documents, the content may demand that you use a combination of organizing approaches. For example, you may be outlining an existing problem, describing the recommended solution, and proposing a timeline or action plan for implementing the solution. It’s OK to use more than one organizing approach in the same document, but do it carefully.

Make Your Text Look Good

Creating a visually appealing email or document adds clarity and invites readership. An organized appearance is a strong support for organized thoughts. Here are some tips:

Use short paragraphs (this goes with the strategy of presenting one idea per paragraph).

Use bullets where appropriate—but remember that overuse can make your document visually displeasing.

Set subheads apart with bold type, italics, underscores, all caps, or color.

After a heading, insert a hard return instead of putting text on the same line.

Skip lines between paragraphs or sections.

Start a paragraph on a new page instead of breaking the paragraph from page to page.

Use at least 1.5 spaces between lines in a paragraph.

Use some of these tips to create a visually appealing document. (For suggestions on making text more appealing to mobile readers, see step 9.) Example 4-4 shows how you can make an email message look good with headings, numerical categories, and further divisions with bullets. Notice that the first paragraph mentions the three numbered sections in that order.

Example 4-4.

A Visually Appealing Email

Brenda,

It was a pleasure meeting you last Tuesday. I look forward to working with you on the leadership-training program. Here is a review of the key points we discussed, a suggested course outline, and the next steps.

Key points discussed

Program objective: Get midlevel managers to exhibit leadership skills

Estimated budget: $75,000

Timeframe: March 1 to June 1

Training hours per month: 50

Suggested course outline

Defining leadership

Evaluating leadership qualities

Cases studies in leadership

Role play

Critique of role play

Wrap-up

Next steps

Approve budget, timeframe, and outline

Determine enrollment

Reserve rooms and handle logistics

Best,

Raj

Your Turn

Organizing your text requires many different techniques, depending on what you’re writing, the audience, your purpose, and other factors. Try these exercises to hone your organizing skills.

From the information in this paragraph, create a bottom-line opening sentence that communicates the key information:

The recent performance evaluation at YB Partners conducted by our team of managers was spurred by YB’s latest commitment to become more efficient in its operations. This initiative was mandated by Spiros Callas, hired six months ago as the new chief financial officer, who from the start has called on his people to improve their operational efficiency. Our team’s evaluation found several areas that needed to be revamped, most importantly security, billing, and hiring. Our team concluded that correcting these specific inefficiencies would require YB to invest, over the course of the next 12 months, a total of $500,000.

Create an explicit subhead that would entice someone to read this paragraph:

Effectively managing email communication can go a long way toward enhancing your productivity. Start by reviewing your email practices and see where you can incorporate these steps, and even suggest some to co-workers. Strive to take control of email—so it doesn’t take control of you.

Find the topic sentence that should’ve come first to introduce this paragraph:

Anyone in this company will tell you that the best charitable program we’ve been involved in was the United Way clothing drive the year before last, where 250 employees participated. Team managers want to ensure that next year’s program doesn’t take too much staff time. The CEO wants the human resource department to select a local charity to partner with for the next five years. HR has already received 27 suggestions from employees involved with worthwhile organizations. Members of the HR team should meet once to narrow the list down to five and then select one. The board has stressed that the charity selected must have a strong local base.

The Next Step

An organized email or document promotes clarity and understanding and helps keep readers engaged. When you want readers to embrace your ideas and take certain steps, you need compelling language and persuasive writing strategies. That’s what we’ll address in step 5 (Persuade Readers to Take Your Desired Action).