THE
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GUIDE TO BETTER BUSINESS WRITING

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THE HARVARD BUSINESS SCHOOL PUBLISHING
GUIDE TO BETTER BUSINESS WRITING

The fast-moving flow of information is the lifeblood of the corporation today. Each day, managers wade through a steady stream of memos, reports, and requests; indeed, the typical executive spends as much as two hours per day responding to e-mails alone.

But as this flood of information grows, so do concerns about its effectiveness: a recent survey of 120 blue-chip American companies found that a third of employees wrote poorly, a problem businesses are spending more than $3 billion a year to correct. Obviously, the costs are high for everyone. One manager's confusing e-mail can generate five more when puzzled employees seek clarification. The more time people spend trying to tease out information they need to know, the less time they have to put that information to work.

And poor writing skills have a personal cost for executives. Those who can't write well not only lose effectiveness and efficiency, they lessen their own credibility and persuasiveness.

The essence of business writing is not simply transmitting data; it is conveying complex ideas and the relationships among them. Complicating this task is the relentless time pressure that is a fact of business life today. This collection aims to help busy executives and employees learn to organize their ideas quickly and communicate them clearly and concisely.

For instance, "The Best Memo You'll Ever Write" and "Writing Well When Time Is Tight" focus on a time-pressed manager's need for a streamlined process to get ideas down on paper.

The next three articles in this collection—"Writing an Executive Summary That Means Business," "Don't Push That Send Button!" and "Making Your Proposal Come Out on Top"—provide tips on adjusting writing to make it most effective in a particular format or context.

We all know editing our own writing is tough. Several articles here, such as "Find the Right Tone for Your Business Writing" and "Five Quick Ways to Trim Your Writing," are designed to help managers develop this crucial skill.

The collection closes with an article targeted at one of the most challenging writing-related tasks a manager can face: serving as a writing coach. "How to Engineer Compelling Prose: Teaching a Techie to Write" grows out of the conviction that every manager can help technical types translate their knowledge, no matter how technically complex, into ABCs: actionable business communications.

At Harvard Business School Publishing, we know that making business writing better is a win-win—both the writer and the reader benefit. We hope this collection helps in that effort!

Sincerely,

Angelia Herrin

Angelia Herrin
Group Editor, Newsletters

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Harvard Management Communication Letter

A Newsletter from Harvard Business School Publishing

Tools, Techniques, and Ideas for the Articulate Executive

Article Reprint No. C0504C

The Best Memo You'll Ever Write

by Holly Weeks

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The Best Memo You'll Ever Write

Every memo—or report or e-mail—is important in today's business environment. If you keep in mind that readers are content driven, time pressed, and decision focused, you can write right—every time.

by Holly Weeks

THERE IS A LOT OF ADVICE out there about what defines good business writing, much of it conflicting. Business readers like writing that is clear, but writers are often encouraged to make their information "sound good." Readers want their information served up simply and directly, but writers are pushed to make their copy "stand out." Readers want to get to the bottom line fast, but writers are criticized if they leave out background detail that someone might look for.

Conflicting advice is hard to follow, and clarity can be the first standard to fall. Not because the writer's thinking is fuzzy—a frequent disparagement—or because the writer is intellectually dishonest and trying to hide the truth behind smudgy language, but because the writer is trying to juggle contradictory ideas about style, presentation, and level of detail.

The truth is that there is a better way to approach business writing, and that is to start from these three realities: business readers are content driven, time pressed, and in search of solutions.

What does that mean to writers? First, they should get out of the impressive-language business. To content-driven readers, language simply carries information, ideas, and the relationships among them. Good language is rather like a good butler—it works smoothly in the service of the reader without calling attention to itself. Second, organization is critical. Whatever particular analysis you make or actions you advocate, how compelling readers will find your report or memo depends largely on how logically you order and present information and ideas.

The starting point

From your introduction the content-driven reader judges whether the rest of your memo is worth his time. Yet the beginning is where many writers ease in and build slowly.

This is a mistake. Your opening must answer the reader's question "Why am I reading this?" To do so, it needs to establish the relevance and the utility of the document as a whole. Here is where the classic business writing text *The Minto Pyramid Principle: Logic in Writing, Thinking and Problem Solving,* by Barbara Minto (Minto International, 1996) is particularly helpful. An effective introduction, Minto says, briskly tells a story built around four elements:

1. **The situation:** A quick, factual sketch of the current business situation that serves to anchor the reader.

READER-FRIENDLY STYLE

Writing clear, content-driven sentences can be tough on people who want their writing to "flow." Think of it: the reason lullabies flow is that you are trying to get a child to fall asleep. Flowing sentences tend to be long, dense, and rhythmic. Choppy sentences are not better—too many of them can be distracting. Readers want the middle ground—brisk, hardworking sentences that carry good content. Brevity is not a virtue in business writing, conciseness is.

Reader-oriented business writing is also tough on people who think complex phrasing makes them look smarter. When a content-driven reader gets bogged down in your phrasing, you don't look elegant or smart. You look pompous and self-absorbed.

Surprisingly, jargon—the specialized language of a particular field—is not inimical to good business writing, if it's suitable to your primary audience. Using jargon, like using acronyms, is a tight and efficient way to communicate among experts. But there are three situations in which you shouldn't use jargon: when it's meaningless, when you don't understand it, or when your readers aren't familiar with it. If you have multiple audiences and you want to use professional terminology because your primary audience uses it, define your term the first time you use it. For a long report, consider adding a glossary.

2. **The complication:** A problem that unsettles the situation in the story you're telling. It's why you're writing the memo or report.
3. **The question:** This might be "What should we do?" "How can we do it?" or "What's wrong with what we tried?" The question does not necessarily have to be spelled out; it may be implied.
4. **The answer:** Your response to the question and your solution to the complication.

The order in which the elements appear can vary. Here are two examples:

Situation–Complication–Solution
(the question "What should we do?" is implicit)

Mediation's popularity has increased over the last quarter-century as people have sought alternative methods of dispute resolution that do not entail litigation's high cost and adversarial approach. But concern is growing that because mediators possess varying levels of training, the quality of mediation is unpredictable. I suggest that we use our organization's stature to spearhead a movement to professionalize the standards of practice for mediation so that mediators can get consistent, high-quality preparation in every state, and individuals or communities submitting to mediation will have confidence in their mediators' qualifications.

Question–Situation–Complication–Solution

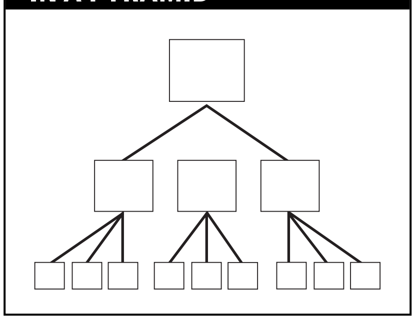
What can we do to professionalize mediation so that the momentum gained over the last half-century is not lost? Individuals and communities turned to mediation in the first place to avoid the expense and conflict of litigation. But the increase in the number of mediators with varying levels of training makes the quality of mediation unpredictable, which causes dissatisfaction. I suggest that we use our organization's stature to spearhead a movement to establish standards of practice for mediation so that mediators can get high-quality training wherever they live, and individuals or communities submitting to mediation can have confidence in their mediators' qualifications.

Notice that shifting the order of the elements still satisfies the reader's expectation for the introduction. But it changes the tone, with the second example sounding more assertive.

Constructing the pyramid

Now it's time to make the case for the solution you advocate. Minto has two recommendations. First, stay away from sentences initially and diagram your arguments and data as small, digestible chunks of information. Second, working from the top down, cluster and hang those chunks in a pyramid shape, with the information below developing and supporting the points above (see "Organizing Ideas in a Pyramid"). An argument can travel horizontally across the chunks on its own level, but always in support of the chunk from which it hangs on the level above. Your thinking may have progressed from bottom up in the pyramid, but your writing is going to progress from top down.

ORGANIZING IDEAS IN A PYRAMID

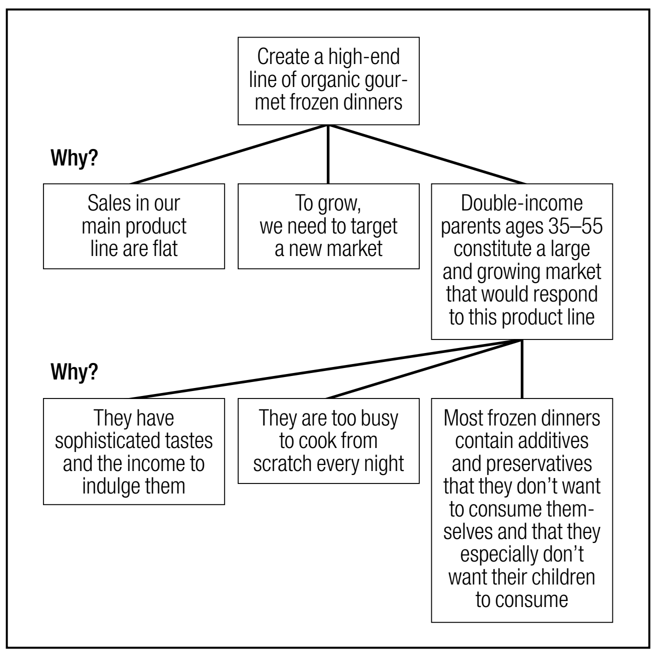


From *The Minto Pyramid Principle: Logic in Writing, Thinking and Problem Solving* by Barbara Minto. © 1996 by Barbara Minto.

Say you have just joined a midsize processed-food company. As the new vice president of business development, you are charged with identifying new markets and leading the creation of products for them.

Sales growth in the company's main product line, frozen dinners, has been stagnant for three years running. But you have identified a promising new target market: working parents between the ages of 35 and 55 who have sophisticated tastes and avoid preservatives and artificial ingredients. You want to convince your company's executive committee to create an upmarket line of organic frozen dinners with a Continental flair.

Here is how you would arrange the chunks in one section of your pyramid:



Once you've arranged the chunks of your argument in this way, the actual writing is easy.

Some final tips

- **Put the weight at the front of each section.** Readers like the journalistic approach—even if the story will break the hearts of millions, journalists give it away in the headline. But writers want to lead the reader, hand-in-hand, through their points and arguments to their conclusion. Except in murder mysteries, readers hate that.
- **Use reader-oriented judgment to decide the right level of detail.** Many overwriters pride themselves on their thoroughness, while underwriters congratulate themselves for being admirably brief. Both do a disservice to their readers and hence to themselves. Overwriters risk losing readers in a flood of detail, while underwriters may come across as superficial thinkers. From the reader's point of view, thorough means "exhaustive" and brief means "short"; the goal should be to be concise, which means "as tight as possible, but complete."
- **Revise by principle; there is no template.** Business writers beg for template sentences, but a template will distort a reader-oriented, content-driven memo or report every time. The principles of good organization—fast, focused openings, the weight at the front of each section, a well-judged level of detail, and Minto's pyramid structure of logic—will serve you better than twisting your content to fit a generic template. Revising by principle will also help you more than the old standby advice: "Set it aside for 48 hours and come back to it." That's an effective way to give you a fresh eye for your writing, but when was the last time you had 48 hours to spare? ❇

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HARVARD MANAGEMENT COMMUNICATION LETTER

A NEWSLETTER FROM HARVARD BUSINESS SCHOOL PUBLISHING | TOOLS, TECHNIQUES, AND IDEAS FOR THE ARTICULATE EXECUTIVE

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Writing Well When Time Is Tight

by Nick Morgan

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Writing Well When Time Is Tight

Using basic organizational principles, you can create a quick, clear presentation of your ideas.

It's 2 a.m. the night before you have to present your strategy for reviving slumping sales. You've come up with nothing all these weeks—until now. Eureka! It's all about brand extension, you suddenly realize, and tomorrow you're going to stand before the board and suggest—intelligent toothpaste.

Yes, intelligent toothpaste. Your little software company will market a brand of toothpaste containing a chip that dispenses instructions for better brushing and reorders the toothpaste when the tube is low. You'll need to set up joint partnership agreements with Wal-Mart and FedEx, but you'll write out the details of that later. Right now it's time to get your proposal written and time's in short supply. And writing was never your best subject.

Here's a three-step fast writing process that will help you express yourself clearly. If you find yourself with time later to add some polish, great. But when your chief goals are speed and clarity, it will get the job done.

❶ **First, formulate a thesis, or main point.** This should be one sentence that articulates the idea and its benefits for the intended audience. In this case, the thesis might be something like:

A brand extension of our software into intelligent toothpaste will revive our flagging sales.

Note that the thesis doesn't capture the full richness and scope of the idea. It doesn't mention the joint partnerships with Wal-Mart and FedEx, for example, nor does it explain what intelligent toothpaste might actually be. But it does detail the benefit that the audience—the board—expects to hear. Note too that the concept and its benefit are directly, not indirectly, linked. Such clarity and simplicity are essential to good thesis writing.

❷ **Next, develop subordinate ideas that support your thesis.** Here are a few possibilities:

All our users also use toothpaste—we've got a captive market with 100% penetration.

Remembering to buy toothpaste before the tube runs out is a tiresome chore.

Consumers will love a talking tube of toothpaste.

Our clients will associate fresh breath with our software and therefore want to buy more of our products.

Now you've got four subordinate ideas here. But what order should you put them in? What's the glue that will hold them together?

❸ **Finally, choose the best structure for your argument.** Now it's time to choose the organizational principle that will allow you to structure your argument in the strongest possible way. Here are four basic organizational principles you might use; which is best depends on the nature of your argument.

Problem/solution. Often the strongest way to organize an argument quickly, problem/solution is easy to follow because it corresponds to a common thought process.

In this case, only one of the subordinate ideas is a problem: *Remembering to buy toothpaste before the tube runs out is a tiresome chore.* The others are neither problems nor solutions to the problem identified. So you have to identify other problems to which the subordinate ideas will serve as solutions:

Our sales are flagging.

—We can really boost our sales by extending our brand into the lucrative toothpaste market because all our users also use toothpaste.

Consumers interact with our current products only when they're working at their PCs; we need our brand to touch their personal as well as their professional lives.

—After our clients buy our intelligent toothpaste, they will associate our software with the pleasant, confident feeling having fresh breath gives them; they'll therefore want to buy more of our products.

Remembering to buy toothpaste before the tube runs out is a tiresome chore.

—Our intelligent toothpaste will ensure that our customers always have toothpaste on hand; they'll appreciate this convenience.

It's hard to get consumers' attention in the crowded high-tech marketplace.

—A talking tube of toothpaste will get their notice because it's new, different, and technologically sophisticated.

Cause/effect. This organizational principle can also be quite effective, but among the subordinate ideas there are no causes, only effects. Thus these ideas will have to be reworked to strengthen the connections among them:

We have an information database of all our users.

Because they're aware of the importance of good dental hygiene, they all use toothpaste.

They each face the daily challenge of ensuring they have toothpaste on hand.

If we can meet that challenge by making it easy for them to accomplish this small but vital need, our users will be grateful and will begin to love our talking tube.

In addition, they will associate our brand with fresh breath.

They will therefore have positive associations that will lead them to want to buy more of our products.

Comparison/contrast. Using comparison/contrast is a good way to highlight the advantages of one model while pointing out the disadvantages of another. In this case, you're going to show how marketing intelligent toothpaste provides more benefits than the idea currently on the table: launching an e-mail campaign using rented lists.

What features do these plans have in common? This is the "compare" part of your argument. In this case, it's pretty simple: Both aim to increase sales. But that's where the similarity ends. You might begin this way:

The brand extension plan and the e-mail marketing plan have a common goal: reviving flagging sales.

Now it's time to go into the "contrast" part of your argument. Here's where you hit your subordinate ideas one by one, building on their benefits while demonstrating the inferiority of the other plan:

All our users also use toothpaste—we've got a captive market with 100 percent penetration. In targeting this market, we're reaching out to people who know us and our products well. We can't expect anything close to this level of brand recognition among those on the rented e-mail lists. And given the level of spam these days, sending out this e-mail could actually damage our credibility with those who do know us.

Remembering to buy toothpaste before the tube runs out is a tiresome chore. Not only will our intelligent toothpaste ensure that our customers never run out

And Don't Forget Strunk & White

William Strunk, Jr. and E.B. White wrote what is still the classic work on writing, *The Elements of Style.* Its timeless precepts are worth keeping in a prominent place on your desk, or taped to your computer—wherever you write.

- **Choose a suitable design and hold to it.** Here, Strunk and White argue that one of the keys to good writing is clear structure that fits the topic well.
- **Make the paragraph the unit of composition.** Thanks to the corrupting influence of the newspaper, where every sentence is often a new paragraph, this very useful rule has fallen into disregard.
- That's unfortunate, because thinking about your writing in paragraph units helps with clarity and precision. See how confusing it is when you start a new paragraph before you should?
- **Use the active voice.** Despite all the ink that has been spilled about the importance of the active voice, writers still use the passive. It takes longer to read, it obscures who's doing what to whom, and it leads to clumsy phrasing. Eschew it. (For two extra points, can you find the passive construction in this item?)
- **Put statements in positive form.** While it is not the case that most people don't have a problem with this rule, its abuse is no longer as widespread as it once was. Strunk and White here are warning against the double negative, simply because it's hard to understand.
- **Use definite, specific, concrete language.** Many of us would prefer, you know, to use stuff that doesn't really say exactly what we, like, mean, because the thing about getting specific is that you have to have something to say. But good writing comes alive around specifics. Just about everyone falls in love, but whom you fall in love with is what matters.
- **Omit needless words.**
- **Avoid a succession of loose sentences.** Loose sentences are joined with "and," and they tend to run on, and they don't have much of a sense of direction, and they get annoying after a while because what we really want is the writer to do the work of figuring out what is most important for us, and that saves time.
- **Express co-ordinate ideas in similar form.** Here, our prose masters argue for parallelism in language that mirrors parallelism in thought. Blessed are the good writers, for they shall be read. Blessed are the book buyers, for they shall enable the writers to eat well. Blessed are the readers of newsletters, for they shall know more than their friends and colleagues.
- **Keep related words together.** The alternative to this rule involves sticking parenthetical thoughts and a string of ideas in between, say, the subject and the verb of the sentence which tends to make readers work harder than they should have to and besides cuts whatever power the original thought possessed and is confusing.
- **In summaries, keep to one tense.** Changing tenses in mid-sentence is something that all inexperienced writers have done at one time or another. It's just one of those things that made readers work harder.
- **Place the emphatic words of a sentence at the end.** Because people remember the last thing they hear or read, put the good stuff at the end of the sentence where it belongs.

of toothpaste, it will also save them the time they would have spent going to the store to buy more. But it's likely that many people who receive our e-mail will perceive it as a waste of time.

As much as we dress up a marketing e-mail with bells and whistles, we're not reaching people in a new way; the technology is old hat. But a talking tube of toothpaste—that's seriously cutting-edge. It has a fun, trendy feel and the potential to become a status item among a highly desirable demographic. The status we gain from this innovative product will enhance the reputation of our other offerings.

Our clients will associate fresh breath and cutting-edge technology with our products and will want to buy more. In contrast, a marketing e-mail offers nothing special for the customer to associate with our products; indeed, those who perceive the e-mail as a nuisance could come to perceive our products *as nuisances.*

Chronology. Arguments structured along chronological lines can highlight the time and data that have already gone into a project. Say, for instance, that your little software company had previously extended its brand into auxiliary consumer products such as talking stuffed animals. A chronological presentation of when the various steps of that process were made and what the results were could help you make your argument as to why extending the brand into intelligent toothpaste is a good idea and why doing it right now is sound business strategy. Arranging handout material chronologically might also make sense, even if you've ordered your argument using one of the other organizing principles.

Once you've put your subordinate ideas together in one of these four ways, you need to flesh out details that will strengthen your argument. Use the main thesis as a check—include nothing that does not support it. Your thesis should be the topic sentence of your first paragraph, and the subordinate ideas, perhaps with some modification, should be the topic sentences for succeeding paragraphs. Then all that's left to do is construct a quick close that reinforces the big ideas in your strategy and seeks the audience's commitment to it.

The document you have once you've completed this process may or may not be rhetorically elegant, but it will be clear and logically sound. And that's a good start. ❑

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HARVARD MANAGEMENT COMMUNICATION LETTER

A NEWSLETTER FROM HARVARD BUSINESS SCHOOL PUBLISHING | TOOLS, TECHNIQUES, AND IDEAS FOR THE ARTICULATE EXECUTIVE

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Writing an Executive Summary That Means Business

by John Clayton

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Writing an Executive Summary That Means Business

Here are some quick tips for mastering the summarize-and-sell approach needed to craft winning executive summaries.

RESPONDING TO A request for proposals (RFP) is pretty straightforward. You describe your company's history, your product or service, its implementation schedule, and the support you'll provide. The one stumbling block is the one section that everyone will read: the executive summary.

What is its purpose? If you answered, *to summarize the proposal,* think again.

"*Executive summary* is a bit of a misnomer," says Tom Sant, founder of the Cincinnati-based Sant Corporation and author of *Persuasive Business Proposals: Writing to Win Customers, Clients, and Contracts* (Amacom, 1992). "What you're really trying to do is lay out the business case."

Thus the executive summary demands a whole different approach to writing than the rest of the proposal, one that balances efficient delivery of key information with a persuasive, well-substantiated pitch. Above all, the executive summary must demonstrate a clear understanding of the potential client's needs. A good way to do this is to include in it the ROI your services will deliver. "You need to describe outcomes," Sant says. "Describe the impact on performance—ideally a measurable impact."

Write with an eye to the audience

A strong executive summary is crafted with the audience firmly in mind: busy executives interested in bottom-line deliverables, not details. "An executive reads for certain keywords, and for the price," says Stacia Kelly, president of Catklaw, a Woodbridge, Va.–based writing boutique. "If he likes it, he'll hand it to an assistant and ask them to read the whole thing."

For that reason, advises Bud Porter-Roth, author of *Proposal Development: How to Respond and Win the Bid* (PSI Research/Oasis, 1998), put the most critical information in the first couple of paragraphs. "The executive may not read any more," he says. But, he cautions, "the RFP writers will read the whole thing." Thus the executive summary has an additional, secondary audience: the middle managers who will make presentations about you and your proposal to senior management. So make sure the executive summary gives them the tools to act on your behalf, Porter-Roth says. To reach both of these audiences, an executive summary should do three things:

❶ **Establish the need or problem.** This might be more challenging than first appears. Often, says Porter-Roth, "RFPs are poorly written. You may have to define the business issues, because the RFP was written by technical people who saw only technical issues."

"You need to convince them that this is a problem worth doing something about," Sant says. "Your biggest competitor may be that they do nothing, that they spend this money on something else."

❷ **Recommend the solution and explain its value.** "Be sure to make a firm, clear recommendation," advises Sant. For example, say something along the lines of "We recommend that integrated content management software be implemented across the company." Then you need to explain the value of your solution. Here you're not focusing on what it is, but on what its return or benefits will be.

"Rather than technical details, you need to say things like 'This solution will reduce your work staff by five people' or 'This CRM will allow you to answer questions while on line, rather than in a call back,'" says Porter-Roth.

❸ **Provide substantiation.** Give the key reasons why your company is the right company to deliver the solution. Here's where you can differentiate yourself—highlight a unique methodology, for instance, or provide a quick case study of your past work. Another idea: Include testimonials from satisfied clients. Just don't get carried away and turn the focus away from the potential client and onto your company. "It's not about the vendor—it's about the customer," says Sant. His rule of thumb: Make sure the executive summary mentions the customer's name three times as often as your company's name.

Making it pitch-perfect

Experts offer these other tips for putting together an executive summary that gets attention and gets business:

- **Use formatting and graphics to highlight your message.** Bullets and headings will make the executive summary easier to skim, and a well-chosen graphic can drive a key point home. If you can find the information in the public record, use a graphic illustrating the client's dilemma.

"This can really rivet their understanding of how bad a situation is," says Sant.

- **Keep it clear, clean, and to the point.** Strike out jargon, advises Catklaw's Kelly. Her pet peeves include *world-class, turnkey, value-added,* and *leverage* (as a verb). And proofread carefully, says Porter-Roth. "Always have a fresh pair of eyes review the executive summary for grammar, selling themes, and especially overall consistency. Too often the executive summary is a cut-and-paste job and it shows."

While you're in editing mode, make sure your executive summary stays true to its name. "Keep your executive summary short—one to two pages for the first 25 pages of proposal text and an additional page for each 50 pages thereafter," Sant says.

- **Take advantage of technology.** If you deliver electronically, Kelly says, use the linking functions in Microsoft Word. "Make it easy for them to click to more information later in the document." ❑

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Article Reprint No. C0208E

Don’t Push That Send Button!

by Nick Morgan

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Don't Push That Send Button!

As information overload piles up, all sides need to reconsider the rules of engagement

THREE YEARS AGO, *HMCL* ran an article boldly setting forth what we called "The Ten Commandments of E-mail." The piece attracted a good deal of healthy commentary about the role of this new form of communication in corporate life. It's about time to look back and see which commandments still make sense and which need revision—and whether any new ones are necessary.

Three years later, we are all much more proficient in the use of e-mail. Generational reluctance to use e-mail has faded away; indeed, seniors comprised the fastest-growing user segment last year. And yet, some of our bad habits have persisted, and a few new problems have emerged since the original piece ran.

The most important problem three years ago was the already overwhelming overload of information, which was exacerbated by the widespread adoption of e-mail. E-mail is what the experts call a nearly "frictionless" form of communication, which means it's easy to do—you don't have to go to a post office or even find a stamp. Just push a button, and you can blanket the world with your thoughts.

Three years on, that situation has become entrenched. Nearly every modern corporate citizen is now on e-mail and has to deal with a vast amount of associated junk. In addition to junk e-mail, we now have pop-up ads and other forms of online irritation that slow down the daily chore of separating the useful information from the trash.

How can we deal with this even more acute crisis? Douglas Neal, a research fellow at CSC Research Services in McLean, Va., advocates taking an active stance in controlling your e-mail flow, particularly with regard to educating your colleagues to use e-mail wisely. He says, "The point is that you have to take actions, not just be passive. You have to reward those who do good and explain to those who are doing wrong that they have done so. Don't get mad, get it changed! Those who suffer quietly will continue to suffer!"

Neal recommends a two-step process for coping with your e-mail. First, he says, analyze the e-mail you receive, charting whether it's useful or not and how often you get both kinds. Then, tactfully tell those who regularly send you lots of low-utility e-mail to stop doing so. Neal points out that overload is in the eye of the recipient: some are overwhelmed by 10 e-mails a day, whereas others can easily handle 100. Take a week or so to chart your incoming e-mail. Then you can organize it with an eye toward addressing any problems that the analysis brings to light.

In the short run, *HMCL* still recommends performing daily "triage" on your e-mail inbox. Scan the entire list, eliminating all the junk mail first. Then group the remaining mail by action needed, just as you would a real inbox on your desk. The efficiency experts tell us that you should handle paper only once in an office, deciding when you first look at it whether to discard it, keep it for filing, or place it on the "do list." You can manage your e-mail overload in the same way.

Beyond the overload issue, the commandments we brought back from the digital mountain three years ago identified some other times you might want to think twice about hitting "send." (We've rephrased some of them slightly for today's more sophisticated e-mail users.)

❶ Use e-mail only when it's the most efficient channel for your need.

Three years ago, we said, "What most people seem to forget is that it's e-*mail*. It's really a modern form of something your great-grandparents used: the letter. The modern incarnation is best for short, informal messages that need to be both written and read. Messages that don't fall into that category might be better handled in a different way."

This was very good advice then, and it remains good advice. In fact, we now have even more options in our grab bag of communication channels: instant messages, text messaging, chat rooms, and even pager code for the teenage crowd.

Each of these other channels is faster, more immediate, and—this is key—more perishable than e-mail. E-mail is forever, and therein lies the rub. When you need to commit something to print, use e-mail. In the business world, that list of needs should be confined to concrete requests, queries, and responses. In other words, the bare-bones daily details of work.

For gossip, back chat, networking, water cooler exchanges, and all those other delightful aspects of business wheel-greasing, use the telephone or one of the other digital forms, where the record is less complete. Or even a face-to-face meeting! (More about this later.)

For messages with a greater feeling of permanence, or more punch, consider writing a real letter, on nice stationery, signed and dated by hand, and mailed through the post. You'd be surprised at how great a personal impact a traditional letter can have in this era of digital impermanence.

❷ Never print your e-mail.

This commandment has not stood up as well over time. We were trying to bring about the paperless office and save trees. But because of the litigious nature of our society, you may well want to keep printed copies of e-mail you've sent as well as e-mail sent to you. Of course, as we've all learned, even e-mail that's been deleted can be recovered, but why take a chance? Print it and take a minute to lament the undeniable fact that the paperless office won't arrive any time soon.

Even your deleted e-mails can be resurrected and read in courtrooms by lawyers who are not friends of yours.

Tony DiRomualdo, strategy and IT researcher, says, "We should not forget that e-mail is a very powerful and persistent medium that poses real and significant risks to companies. Surely the Andersen/Enron scandal holds many lessons about this point. And if used for the wrong purposes it can have nasty consequences. Don't say anything you would not want the entire planet to read at some point." But if you insist on saying something potentially actionable, keep a copy for your own records.

❸ Send nothing over e-mail that must be error-free.

Time has only strengthened our opinion that this commandment is right on target. We said then, "It is simply impossible to proofread successfully on the computer screen." That is just as true now as it was then. If a communication must be error-free, then print it out, pick up something like an old-fashioned ruler, and read away, slowly, line by line. Then reread it backwards, word by word. And remember that spell checkers don't catch the wrong word spelled correctly. Get someone else to read your words, too.

❹ Never delete names from your address book.

This advice remains especially pertinent for the virtually challenged. And yet it hardly seems like the biggest challenge we face today in the virtual world. It will save time to keep an up-to-date address book and to know how to use it. But not much time, unless you're prone to sending out a good many broadcast e-mails. And why would you want to do that? That usually comes under the heading of "spam," and it's at the heart of the problem of information overload.

❺ Never forward chain e-mail.

In three years, there has been no lessening of this scourge! It is a practice universally decried, and yet we all know people who do it—and most of us will admit to having perpetrated a chain e-mail ourselves late on a Friday when everyone else has left early and we're still stuck in the office.

❻ Never send e-mail when you're furious or exhausted.

This is even better advice than we knew at the time. Look at Microsoft, for example. The e-mails key players sent got them their day in court, and it wasn't what they wanted. It's an example we all can learn from. Legally, e-mail belongs to the company that provides the system and the link-up. You don't have privacy as an individual. And the court can wrest the e-mail records from the company, as happened to Microsoft. Don't—*don't*—commit anything to writing you wouldn't want to have read in court. Period.

❼ Don't pass on rumor or innuendo about real people.

We repeat this advice in recalling the British man who boasted about his sexual exploits of the night before in an e-mail, only to see the boast spread out to thousands of e-mail recipients in a matter of hours. Avoid spreading false information about real, live people. It will come back to haunt you. Even your deleted e-mails can be resurrected and read in courtrooms by lawyers who are not friends of yours.

❽ Nor should you do so about companies you work for or may work for one day.

In the intervening years, this practice has grown up and become a Web site. Most companies have at least one rogue site that mocks them, slanders them, or disses their products. Apparently, this advice pertains only to a distant, more civilized era—say, 1999. And these Web sites sure are handy when you're considering a job offer from a company that has one.

❾ Never substitute e-mail for a necessary face-to-face meeting.

Anecdotal evidence of layoffs accomplished via e-mail only serves to reinforce this point. Here's what we said then, and every manager should have these sentences bronzed and placed in a conspicuous place in the office: "Never reprimand, reward, or fire someone who reports to you via e-mail. There's a special circle of hell awaiting those who do. We owe it to our humanity to perform these obligations, whether difficult or easy, in person. And remember that when you're trying to persuade someone to do something, or someone wants to persuade you, there is no substitute for a face-to-face meeting."

❿ Remember this hierarchy: first the meeting, then the phone call, then the voice mail, then the e-mail.

This commandment still holds true: for the greatest impact, hold a meeting. You get more "bandwidth" face to face. The phone call eliminates the body language, but maintains tone and live exchange. Voice mail gets tone but does without live exchange. And an e-mail is neither live nor terribly nuanced. Hence the frequent misunderstandings about jokes attempted over e-mail, and those annoying but necessary little dingbats people use to signal emotion.

Final score: 80% of the Ten Commandments of E-mail still hold true. Some 20% have not held up or are now irrelevant. What about advice we would give now that we didn't then? Just one, our eleventh commandment:

⓫ Your e-mail is hackable and retrievable, and it can be used against you. Use only when absolutely necessary.

E-mail is an extremely efficient form of communication when used sensibly—but be careful out there. It's a litigator's paradise. ❑

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HARVARD MANAGEMENT COMMUNICATION LETTER

A NEWSLETTER FROM HARVARD BUSINESS SCHOOL PUBLISHING | TOOLS, TECHNIQUES, AND IDEAS FOR THE ARTICULATE EXECUTIVE

Article Reprint No. C0207A

Making Your Proposal Come Out on Top

by Nick Wreden

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Making Your Proposal Come Out on Top

In the high-stakes game of proposal submission, remember this: keep your focus on the prospect, and always follow the rules.

Nancy Sucher doesn't just read proposals. She looks for the start of a relationship—a partner who recognizes her needs and will speak to her clearly.

To Sucher, procurement negotiation manager at the $3.5 billion Boise Office Solutions, an office supplies and paper distributor in Itasca, Ill., potential relationships start from following the RFP (Request for Proposal) instructions precisely. Not only do proposals that follow a different organization create more work for Sucher and her staff, they also raise a red flag. "If they don't listen to us—the customer—now, will they listen to us later?" she asks.

Selling may woo prospects, but customers are often won with proposals. Done right, proposals can be your best avenue to new business, funding, or opportunities. Done wrong, they are a waste of time and money. The key to increasing your winning percentage is bearing in mind the prospect's needs at all levels of the process. This rule applies as much to meeting the basic specs of the submission as it does to how skillfully you assess and respond to the prospect's needs. Ideally, this approach results in a concise, readable, and persuasive document.

Work from the prospect's point of view

Understand that while companies use proposals to underscore why they should be chosen, prospects, who face a pile of five, ten, or even more proposals, are actually seeking reasons to eliminate candidates. "Companies don't start by looking to select the best proposal. They seek to eliminate all those that don't meet their criteria. That means it's critical to make it as hard as possible to be eliminated during the initial review," says Dan Safford, CEO of the Seattle-based proposal-writing and training firm PS Associates. Let the prospect's requirements drive the process. Proposals should never be about what you can do, but what you can do for prospects. "A good proposal specifically addresses a prospect's needs," says Michael Kelley, a PricewaterhouseCoopers partner who specializes in global advertising, branding, and marketing. "A poor proposal discusses only your credentials." Never, for example, start a proposal by describing your corporate history.

Follow a disciplined process

A systematic, repeatable proposal process ensures that all requirements—and proposal budgets—are met. It reduces the last-minute rush that breeds ineffectiveness and errors. It contributes to accurate pricing so that the job is both winnable and profitable.

Following the right process can help avoid elimination. If you're responding to an RFP, follow its instructions to the letter. Sucher, for example, requires proposals to be unbound to speed copying and review. If the presentation requirements are not spelled out, call the prospect to determine the expected format.

Reinforce this with a prospect meeting whenever possible. Kelley says such meetings clarify the RFP, provide insights about the selection criteria and decision makers, and start establishing the relationships that can lead toward selection.

This process includes:

Thorough research. "Spend at least as much time in studying, analyzing, planning, researching, and otherwise preparing to write as in writing itself," writes Herman Holtz in *The Consultant's Guide to Proposal Writing.* Research, backed by a clear understanding of prospect requirements, enables you to develop strategies, solutions, staffing requirements, and even pricing. Often it's helpful to show prospects initial efforts in these areas and ask for feedback, says Kelley. Such guidance can help ensure that your efforts fulfill expectations.

Timetables and an outline of responsibilities. You'll need to determine timetables, responsibilities, and budgeting. Schedule responsibilities for key personnel, including managers, writers, and technical experts. Include time for multiple drafts, graphics development, reviews, and production activities such as copying and binding.

Careful attention to writing. The most vital part of the process is, of course, writing. The proposal must clearly document an understanding of the problem, explain a solution, describe activities, and detail anticipated results. "Proposals are often won or lost on the effectiveness of the writing," says G. Jay Christensen, who specializes in teaching business communications at California State University in Northridge, Calif. "Use simple, conversational English, with one idea per sentence. Avoid jargon. Revise, and revise again, for clarity." Back up claims with case studies, research, or third-party recognition.

Organize the framework

A key element of the proposal is the executive summary. Executive summaries are like movie trailers. They pique interest with appealing highlights, communicate the essence of the coming presentation, and help the audience determine whether to invest further time and information.

As a result, an executive summary demands your best thinking—and writing. Often, it is the only section read by decision makers. Within limited space, the executive summary must communicate key analyses, capabilities, and benefits persuasively enough to compel the reader to read the entire proposal. No wonder Safford calls an executive summary "an elevator speech in print."

"But despite their importance, most people do not devote enough time to executive summaries," says Christensen. "Executive summaries don't write themselves. They require an in-depth understanding of the proposal as well as an ability to succinctly communicate reader-specific benefits with punch and verve."

Executive summaries are neither prefaces nor introductions. They are not the place to introduce new material. Crucial elements of an executive summary include analysis, scope, recommendations, implementation highlights, and, most important, benefits. Length can range from one or two paragraphs to one or two pages. One rule of thumb says an executive summary should be 10% to 15% of the length of the proposal.

However, like proposals, the more concise executive summaries are, the better. Use bullet points to telegraph prime concepts or activities. Avoid fluff like "We are pleased to present…." Instead, point out that you propose setting up a European distribution network that can increase sales 40% by 2005. Says Kelley: "The more specific it is, the more they'll know you've listened and understand their problems." Don't be afraid to mention pricing; prospects will immediately scan the proposal for it anyway.

Experts debate about whether to write the executive summary before or after the proposal. Writing it beforehand establishes the framework and themes for the proposal. It also avoids the common trap of having the executive summary masquerade as a conclusion. Writing the executive summary afterward simplifies the capture of relevant points, primarily by culling key sentences. Consider combining the strengths of both approaches. Write an executive summary beforehand to crystallize themes and benefits, then revise that summary in the context of the final proposal.

Regardless of when you write the executive summary, start with a one-sentence summary that encapsulates the prospect's problem, your solution, and the benefits. Expand that sentence into about 100 words. Then add supporting points until the most important issues have been summarized.

Another valuable tool is the response matrix, a three- or four-column spreadsheet that outlines the specification, indicates compliance or another response, and shows where the requirement is addressed in the proposal. It can include a blank column for notes or check-off. The response matrix is excellent for indicating where you have addressed important issues not specifically raised in the RFP. Providing summaries in the margins, as a college textbook does, also speeds comprehension and review.

The appendix, in turn, is an opportunity to expand or document points made in the main body. This material can range from brochures to photographs to even video. PricewaterhouseCoopers sometimes includes a CD-ROM with an organizational chart featuring members of the proposed team. Prospects can click on the name of a specific manager and see both a tailored résumé and a short personal introduction on video.

Other key tips for creating winning proposals include:

Personalize, personalize, personalize. Proposals must be presented from the prospect's point of view. Emphasize specific benefits and value over your general capabilities and expertise. Edit standard résumés to reflect experience important to the prospect. PricewaterhouseCoopers even emphasizes aspects of its corporate history according to the needs of specific prospects.

Avoid boilerplate, despite its value as a timesaver. Boilerplate language in proposals is like junk mail in a mailbox—easy to spot and an easy excuse to discard the proposal. It also sends the message that you do not consider the project important enough for personalization. The only acceptable boilerplate is standard contracts, rate sheets, and proprietary and nondisclosure statements.

Remember that details sell. Avoid generalities and hyperbole. Banish every "uniquely qualified," "extensive experience," and other vague braggadocio that undermines credibility. Instead of saying, "We will provide a useful manual," explain that a 50-page, 6" x 9" booklet will have an operational checklist as well as 10 questions at the end of every section to ensure understanding. Even avoid generic labels like "proposal." Instead, use a description like "a comprehensive program to improve quality through cost-effective inventory management."

Paint a picture. Graphics communicate clearly and are particularly useful for explaining complex processes. Tables with features and benefits are especially powerful. Also use graphic elements such as call-out boxes to highlight key points. Summarize with bullets where appropriate.

Be concise. Keep the proposal as short as possible. Some RFPs have page limits; make that an outer limit, not a target. It's tempting to add everything that a prospect might be remotely interested in, but such material dilutes your ideas and capabilities. One distinct benefit: short proposals usually get read first, which makes yours the standard by which others are judged.

Take time to assess

The proposal process doesn't end after submission. Proposals that have survived the prospect's best elimination efforts can generate an invitation to present. The prospect uses this opportunity not only to address issues raised in the proposal but also to determine chemistry and competence.

Win or lose, ask for a debriefing. Debriefings are vital for improving the proposal management process and bolstering your win-loss record. If you win, find out why. Which areas stood out, and which were ignored? "Client guidance after the contract is awarded can also help you execute the project more successfully," says Safford. Sometimes, clients may even be willing to turn over losing proposals for additional insights.

Loss debriefings are also valuable. Finding out why you were eliminated can strengthen future proposals. On occasion, it can provide a springboard to further work, especially if your recommendations or skills in a particular area were strong. "Both win and loss debriefings give me the opportunity to build a longer-term relationship, which is my prime objective," says Kelley.

Too often, proposals are marketing afterthoughts, left to the last minute and filled with search-and-replace generalities. No wonder success rates suffer, and proposals get associated with uncertain return from extended effort. But well-written proposals can actually be your best sales tool—and the start of a long relationship. ❑

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FURTHER READING

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by Herman Holtz
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HARVARD MANAGEMENT COMMUNICATION LETTER

A NEWSLETTER FROM HARVARD BUSINESS SCHOOL PUBLISHING | TOOLS, TECHNIQUES, AND IDEAS FOR THE ARTICULATE EXECUTIVE

Article Reprint No. C0109D

Find the Right Tone for Your Business Writing

by Richard Bierck

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Find the Right Tone for Your Business Writing

The tone for every memo, e-mail, or report is determined by the interplay between energy and formality.

MANY WRITERS agonize over word choice, syntax, and structure. But getting the words down on paper doesn't mean the job of writing is done. One of the most important steps in writing is matching the tone of the piece to the occasion—and the audience.

Tone in writing is an elusive quality that determines whether readers are put off or turned on, whether they laugh with you or at you, whether you come across as boor or a seer. Outlining a well-reasoned solution to a complex problem won't bring readers to your way of thinking unless the writing connects with them on a visceral level. Inappropriate tone leaves readers with a bad mental aftertaste. Appropriate tone allows the reader to concentrate on content without any background noise.

Most successful businesspeople have a keen sense of what's appropriate when talking to others. But many fail to apply this judgment to their writing—whether in e-mails, memoranda, letters, or proposals. Often, their writing is far too stiff and formal or too relaxed and colloquial. Just as often, writers produce pieces that are too upbeat for situations requiring more gravity, or too grave for circumstances calling for more energy.

For an appropriate tone in every circumstance, you need to carefully monitor two attributes—energy level and degree of formality.

Measure the energy conveyed in a piece of writing by asking, "How hot or cool should this memo be? The extremes of the prose thermometer reveal the range of available choices. Here are examples of both polarities.

Hot

Anyone who hasn't had their head in the sand lately knows about the big problems we're having in the marketplace. Taking aim at the weaker items on our product line, a horde of well-trained competitors is inflicting mortal wounds. As a result, we are hemorrhaging revenues. How do we stanch the bleeding? Dump our weakest products and channel our energy into the stronger ones. That means we must pound out a powerful marketing plan to drive home the advantages of our products to the public. We must brainstorm ASAP to come up with a strategy that has teeth. If we fumble this one, we all may soon be standing in an unemployment line.

Cool

By now, most of us are probably aware of the critical challenges we're facing in the marketplace. Competitors are cutting into our market share and diminishing our revenues. The only solution may be to forgo some of our less successful products so that we may concentrate on the more successful. To do this, we'd have to streamline our marketing efforts to communicate value to consumers. This will require planning sessions to develop an effective strategy. I recommend that we proceed with all deliberate speed to develop a viable approach. The consequences of failing to move quickly and incisively could indeed be dire.

Though these two passages convey the same content and have the same intent—to motivate the reader to act—they vary greatly in tone. The hot passage draws on hyperbole (the ostrich image), strong adjectives (e.g., "mortal"), and combat metaphors to communicate urgency. Strong verbs and vivid (at times, even surgical) images are used to incite the reader.

The cool passage is less alarming and, hence, conveys less urgency. It relies more on readers to discern the seriousness of the situation by reading between the lines a bit. While the tone of the hot passage tone is an alarmist call to action, that of the cool one is less likely to cause a panic, for it avoids emotionalism.

The second attribute to measure is formality. As with the energy level, the formality of a memo depends on the occasion, the recipient's predilections, and the character of the company.

You need to know what is right for your situation. In a venerable insurance company, for example, it's almost always better to stay well within the formal range of the spectrum. Conversely, if your company is a snowboard manufacturer, this kind of formality may only bring derision and consign your memo to the circular file.

Some examples:

Informal

You've already got the 4-1-1 on what I'm going to say: Our sales figures reek. Competitors are putting the hurt on us in a serious way, and it's siphoning money out of your pocket and mine. The only way out of this mess may be to trash the losers in our product line and pump the winners. We're history unless we grease our marketing skids and persuade the public that using our products will produce euphoric moments. We must brainstorm ASAP to come up with a strategy that rocks. If we don't, we all may soon be asking: "You want fries with that?"

Formal

Only the myopic could now be unaware of our unfortunate position regarding market share. Our sales figures have *reached a nadir, and our competitors are getting the best of us, much to the detriment of our pocketbooks. Perhaps the only solution is to forgo the less profitable of our offerings, and focus our attention on our more successful products. Crucial to a recovery will be a well-crafted marketing program designed to heighten consumer demand. Failing to devise such a strategy may make all other concerns moot.*

The informal passage is dominated by everyday colloquialisms. Instead of more lofty metaphors, it uses the slang of popular culture. Thirty years from now, readers would have a hard time understanding its meaning. Yet now, this tone can connect with certain kinds of audiences.

By contrast, the formal passage seeks no such personal connection and avoids common parlance. It distances the writer from his or her audience. While some readers might view this tone as being condescending, others would regard it as being appropriate for a specific business context.

In many ways, you'll find that the decisions surrounding energy and formality overlap. Informal compositions often tend to be hot or at least warm, but not always. Formal writing is typically cool, but it can sometimes include warm elements such as metaphor or short sentences that convey strong action.

Seldom do even professional writers achieve the appropriate tone on the first draft. It takes a refined sensibility and careful honing. Even then, you may not be sure that you've struck the right tone.

To make sure, ask some people whose judgment you respect to give it a test read and get their reaction. Do they think it's too energetic or hyperbolic for the audience and the occasion? Or is it too frosty? Similarly, do they think the writing is too distant or too familiar? What are the offending words or phrases? How can they be changed to do the job at hand? Using test readers is hardly rocket science, but those willing to go to this trouble invariably produce more effective writing.

Using test readers may seem like a lot of trouble. But for writers committed to producing effective, impressive prose, this practice is less time-consuming than continuing to toil futilely in isolation. Test readers can help you get back on course before you've strayed too far.

And besides, it's good to share the agony of writing. In the end, however, writing remains a solitary sport, and you are ultimately responsible for developing the right content—as well as striking the right tone. ❑

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HARVARD MANAGEMENT COMMUNICATION LETTER

A NEWSLETTER FROM HARVARD BUSINESS SCHOOL PUBLISHING | TOOLS, TECHNIQUES, AND IDEAS FOR THE ARTICULATE EXECUTIVE

Article Reprint No. C0304D

Five Quick Ways to Trim Your Writing

by John Clayton

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Five Quick Ways to Trim Your Writing

At the eleventh hour, you've got to do surgery on a crucial report and make it 30% leaner. Here's how to do it with a minimum of pain.

WORD COMES BACK from the boss on the report you labored weeks over: "This is good, but it needs to be a lot shorter." You throw up your hands in frustration. She didn't tell you what to cut or how. Not only does your report gather together all the information the committee needs to make a decision on the project, but it gathers that information together well. Every section furthers the argument, you say to yourself; there's nothing extraneous in it.

Similar situations crop up in many business settings. A presentation handout you want to keep on one page. A project description limited to 200 words. An executive summary of a complex, detailed report. Here are some tips for cutting length without losing meaning.

❶ Take a good, hard look at the structure

Which parts support the roof, and which can be cut away without collapsing the whole structure?

The old advice about previewing and then reviewing your message may be fine for lengthy reports and essays, but when you're squeezed for space, they amount to building three walls to do the job of one. Don't announce what you will say, just say it.

For example, you may have followed your old English teacher's advice to include in your introductory paragraph one sentence previewing each point you will make. Here's an easy cut: Delete the introductory paragraph and jump right into the message.

Additionally, the foundation you built may be more solid than you need. For example, maybe you've included detailed background information. Does your audience really need it all to understand and be persuaded by your argument? If not, summarize it briefly and get right to the bottom line.

Finally, some of your structure may be unnecessary. If a section exists mostly for show, it can go. Cut anything that illuminates something other than your main point.

❷ Stick to specifics

Specifics make up the meat of your argument, and generalities the carbs; put your writing on a high-protein, low-carb diet. A telling anecdote or statistic will stay with your audience longer than a generality and will usually convey the more general message.

Think of how politicians often expend their precious time in a speech or debate highlighting a specific hero's story. They know that telling a story (of a wounded soldier, laid-off worker, entrepreneur) is the best way to put forward a platform (better weapons, more unemployment insurance, lower taxes).

❸ Use formatting creatively

You might first think that adding illustrations or headings to a report will eat up space, but in fact this tactic can help you shave down how many words are needed to get your message across.

Headings. Headings are useful because they clarify a report's organization, eliminate the need for topic sentences, create white space, and help readers skim. But the way they're usually formatted—on a line by themselves, sometimes with a blank line following—takes up a lot of space. If you want the space back without losing the headings, convert them to in-paragraph headings like the one at the beginning of this paragraph.

Tables. If you want to compare and contrast various options, do so in a table rather than in running text. Just to start with, you won't have to keep repeating the names of the different companies, for instance, or the criteria on which you're judging them. More significantly, a table presents complex comparisons in a succinct way. Your readers can compare and contrast Options A and B, Options B and D, or Options A, B, and C, as they want; you don't have to write out all the similarities and differences between various options.

An added bonus: The audience's expectations change when they look at tables. They don't expect complete sentences, and they may be willing to look at text in a smaller font.

Maps and diagrams. Think how long it takes to write out directions: *Maple St. is the third stoplight. There's a Denny's on one corner and a used-car lot on the other corner, but if you get to the Clarksdale city limits you've gone too far.* A map conveys the same information concisely and accessibly. Flowcharts and organizational charts likewise convey complex relationships in easy-to-understand form.

Emphasis. To make sure your audience remembers what you have to say, you may be tempted to use phrases like *This is the key to the whole thing* or *If you take one message away from this document, let it be the following.* Instead, put that message in boldface and you've conveyed those phrases implicitly.

❹ Downshift your tone

There is something about writing a report that causes many people to adopt a formal, bureaucratic tone. When you write this way, you use bigger words, more parenthetical phrases, and a greater number of complex sentences. If you shift to a more informal tone, you may find yourself writing shorter.

Here's one place to start: Use contractions. It's not that changing *cannot* to *can't* and *will not* to *won't* saves so much space, but using contractions will help you avoid the long, formal style of bureaucrats, explains Edward P. Bailey in *Plain English at Work.*

Another way to shift your tone is to speak directly to your audience, using personal pronouns such as *you*. Maybe you had a teacher who didn't allow you to use *you*, so you developed wordy ways to avoid it. For example, *The lights must be turned off before the office is vacated*.

But *you* is fine in most business contexts, and using it can let you write a lot shorter. *You must turn off the lights before you leave.* We've gone from 60 to 45 characters—a savings of 25%.

❺ Cut and combine

Look over your document sentence by sentence, looking for ways to cut words by combining two sentences into one. Consider these sentences:

This presentation examines the benefits of outsourcing. It is my recommendation that we reduce overhead by outsourcing noncore processes such as customer service, fulfillment, and other support functions.

The first sentence is dead weight. Cut it out and write instead:

We could significantly reduce overhead by outsourcing such noncore support functions as customer service and fulfillment.

You've now both announced your topic and stated your position on it with wording that's almost 50% leaner than the original.

When the length of a document doesn't matter to the reader, you insert lots of phrases that help pinpoint what you're talking about. The previous sentence contains examples of such phrases: *of a document* and *to the reader.* You don't always need to be so specific. For instance, if we delete those phrases so that the sentence begins, *When length doesn't matter,* the word count has been significantly reduced without any loss of meaning.

Here are some other ways to crop words:

Drop lengthy titles. Rather than *Bob Smith, Assistant Vice President for Corporate Communications and Government Relations, says…*you could write *spokesperson Bob Smith says….*

Look out for the obvious. Rather than write, *Obviously, this means we will need to raise prices, which could reduce sales,* write instead, *Our need to raise prices could reduce sales.* Do a search for the word *obvious*, and see if the sentences in which it or *obviously* appears could be trimmed down. After all, if something is obvious, why waste precious space saying it?

Replace long words or phrases with shorter ones. In *Legal Writing in Plain English*, Bryan A. Garner notes some easy ways to tighten up your language. On its own, each such change may save just a little space, but it's like saving pennies: Eventually they add up to something meaningful.

Convert "of" phrases to possessives. For example, change *the success of the company* to *the company's success.*

Replace bloated phrases with simpler words. *An adequate number of* can be replaced with *enough*, *notwithstanding the fact that* is a windy way of saying *although*, and *during such time as* simply means *while*.

Use active verbs. Passive constructions require more verbiage. For example, look again at the final example under "Downshift your tone." Avoiding *you* required using a passive construction (*The lights must be turned off before the office is vacated*) that was much wordier than the sentence with an active verb (*You must turn off the lights before you leave*).

Never express a number in both digits and words. There's no need to write *Twelve (12) people attended the meeting;* either the word or the numeral works fine on its own. Your corporate style manual may have specific guidelines on when to express numbers as numerals and when to express them as words, but following two general principles can save you space: (1) Never double up; (2) Always use numerals for large numbers (*200,000*, not *two hundred thousand*).

Some of these tips may sound suspiciously like the general advice you get on how to write well. That's no coincidence: Good writing is concise.

But the problem we set out to solve was that your boss told you to cut your report by 30%. Following these tips can do that for you. And if she comes back to you to say, "You know, that shorter version is a lot better written, too," that will just be a bonus. ❑

John Clayton *is a Montana-based freelance writer whose clients range from A.T. Kearney to* National Geographic. *He can be reached at hmcl@hbsp.harvard.edu*

FURTHER READING

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HARVARD MANAGEMENT COMMUNICATION LETTER

A NEWSLETTER FROM HARVARD BUSINESS SCHOOL PUBLISHING | TOOLS, TECHNIQUES, AND IDEAS FOR THE ARTICULATE EXECUTIVE

Article Reprint No. C0209E

How to Write Correctly Without Knowing the Rules

by John Clayton

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How to Write Correctly Without Knowing the Rules

If you don't have time to face down that thorny grammar issue, don't worry—just "write around" the problem.

YOU'RE WRITING A REPORT on a visit to an affiliate office, and you type the sentence *Everyone here, even she, believes her data are flawed.* You pause, puzzled. Should that be *even her?* It doesn't sound right, but you can't put your finger on why. Stopping to ponder it, and perhaps consult a grammar book, you lose your train of thought. You may soon start wondering if *believes* should be *believe* or if *data are* should be *data is.* Every such mental debate chips away at your productivity—and your confidence in your own writing ability.

The English language, with its endless capacity to absorb influences from a variety of cultures and languages, occasionally presents challenges that can slow down even sophisticated writers. It's a dilemma: poor writing sends bad messages to readers, but stopping to wrestle with the complexities of grammar and usage can waste time and money. The more productive solution is to develop strategies to avoid these quagmires.

There's no shame in doing so—we readily use shortcuts to solve other problems. Think of how you add numbers in your head by grouping tens and hundreds. It's not cheating. The important thing is that the result is correct; you need not demonstrate your knowledge of arithmetic.

The same principle holds for composition. You don't have to demonstrate your knowledge of obscure grammar rules. You can simply "round up" to an equivalent phrase that's easier to handle. By rewriting the sentence, you avoid the complicating issue.

Let's return to the question of whether the pronoun in the example should be *she* or *her.* The "correct" answer is *she* because the pronoun addresses the subject (rather than the object) of the sentence. But you need not know this to write a correct sentence. You can simply avoid the issue by using the person's name again instead of the pronoun. *Everyone here, even Linda, believes her data are flawed.*

Now, for those who are hung up on the verb *believes:* it's correct, because *everyone* is an indefinite pronoun and indefinite pronouns nearly always take singular verbs. But again, you can rewrite the sentence to avoid that construction. *Each person here, even Linda, believes her data are flawed.*

Finally, there's the question of what verb to use with *data.* Officially, *data*—like *criteria* and *media*—is a plural noun and thus takes a plural verb: *data are.* But so few people know or use this rule that many (though not all) experts now accept the singular: *data is.*

Given this wishy-washy state of affairs, the best solution may be an avoidance strategy: to rewrite the sentence so that *data* doesn't require a verb. *Each person here, even Linda, believes there are flaws in her data* or… *flaws weaken her data.*

If you don't know the grammar rule, recast the sentence so that you can use grammar you do know. Just be careful not to change the meaning of the original statement.

Let's look at some other examples.

The proposal will sink or swim on its merits. Does *its* need an apostrophe? The rule is that *it's* substitutes for *it is,* whereas *its* indicates possession (so the sentence is correct as written). But if you're not sure about the rule, instead of looking it up, simply rewrite the sentence! *The merits of the proposal will determine if it sinks or swims.*

The effect of the regulation will be to raise costs. Is that *effect* or *affect?* If it's a noun, it's most likely *effect.* (*Affect* is used as a noun only in specialized contexts to refer to the manifestation of emotion.) So the sentence is correct as written. But why not avoid the issue? *The result of the regulation will be to raise costs.*

This example demonstrates how you can use the same avoidance strategy with your choice of words. In *The Art of Spelling,* Marilyn vos Savant notes that homophones (words that sound alike but have different spellings and meanings) cause particular problems because your spell-checker won't see anything wrong when you misuse them. Commonly confused homophones, she says, include *capital/capitol, complement/compliment,* and *palate/palette.*

When you come across a problem word, focus on your intended meaning instead of the word itself—then you will be better able to think of a good substitute. Instead of *capitol*, use *State House* or *Congress;* instead of *capital,* use *Washington* or *Albany.* Instead of *compliment,* use *praise;* instead of *palette,* use *available colors.*

Remember that the point of writing is not to show off how many words or rules you know. Your obligation to your readers is simply to master the subject under consideration and communicate your knowledge of it clearly.

Too often it seems that usage problems arise from precisely the desire to overreach, to show off knowledge. Take the abbreviations *i.e.* and *e.g.,* which are commonly confused and often incorrectly punctuated. You can avoid them by using the phrases *in other words* (for *i.e.*) and *for example* (for *e.g.*). After all, that's what those terms mean! Why bother to dress up those meanings with Latin abbreviations that your audience only vaguely understands?

Or how about good old *who* and *whom?* In *The Manager's Guide to Business Writing,* Suzanne D. Sparks notes that *who* and *whom* are a source of endless problems. She cites the example: *There's a bonus for whoever finishes on time.* Should that be *whomever?* Who cares? (Or, if you prefer, To whom does it matter?) Let's just rewrite the sentence! *If you finish on time, you get a bonus.*

All you need to know is how to identify the problem. You don't need to know how to fix the problem, just how to steer clear of it. For example, the *who*-versus-*whom* problem arises when your question contains prepositions, such as *to, for,* or *against.* So when you see that you've written a question with prepositions, rewrite it without them. For example, rather than *Who are you speaking to?* (which is, to grammatical perfectionists, incorrect) or *To whom are you speaking?* (the correct, though almost too formal, version), write *Who is your audience?*

Note that the focus here is on *re*-writing the sentences. It's OK to write them incorrectly the first time. In fact, it's better to write them incorrectly so you can focus on your train of thought first. That's why you go back and proofread later. It's easier to rewrite several sentences in a second draft than to keep interrupting your thought process to write them perfectly the first time. (For more information, see the article "First, Kill the Editor," reprint number C0105B.)

Many writers will do anything to avoid mastering the most intricate grammar rules—rules that are in constant flux anyway as usage changes. If you're one of those writers, you may find that devising avoidance strategies will save you time and frustration. ❑

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FURTHER READING

The Manager's Guide to Business Writing
by Suzanne D. Sparks
McGraw-Hill ♦ 1998

The Art of Spelling: The Madness and the Method
by Marilyn vos Savant
W.W. Norton ♦ 2001

HARVARD MANAGEMENT COMMUNICATION LETTER

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Article Reprint No. C0212F

Is Following the Rules Tripping Up Your Message?

by Chris Bielaszka-DuVernay

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Is Following the Rules Tripping Up Your Message?

Some grammar rules you learned in school aren't rules at all. Here are the most troublesome.

WILL THE SKY FALL if you end a sentence with a preposition? Will gravity fail if you split an infinitive? No, of course not.

In fact, your most sophisticated readers won't even bat an eye. And it's not because they've become so accustomed to the shortcuts and improvisations of e-mail that they don't notice when someone breaks a rule. They still notice, all right. It's just that they know that some "rules" aren't rules at all—and never were.

These nonrules are known as "superstitions" among the grammar and usage set, and they may be preventing your writing from being as strong, direct, and effective as it can be. Here are the four most common:

❶ **Never end a sentence with a preposition.** This is one of the most enduring of superstitions, despite centuries of commentary trying to dispel it.

The origins of this bugaboo lie in etymology and the origins of English grammar, explains Bryan A. Garner, widely respected language authority and author of the excellent *A Dictionary of Modern American Usage.*

In Latin, *preposition* means "stand before," and in Latin a preposition does indeed stand before other words; it's the one part of speech that can't end a Latin sentence.

But English is not Latin. Although English grammar is modeled on Latin grammar, the languages are very different and some rules just don't translate well.

Criticized for ending a sentence with a preposition, Winston Churchill is said to have quipped, "That is the type of arrant pedantry up with which I shall not put." As this absurdly stilted sentence demonstrates, the syntactical contortions necessary to keep a sentence ending preposition-free result in awkward, turgid prose—not the best vehicle for your message.

❷ **Never split an infinitive.** The fact is, some infinitives beg to be split. Consider this sentence: *Our CEO expects to more than double revenues this year.*

Try rewriting it so as to eliminate the split infinitive; there's no way to do it without losing the precise meaning of the original.

Here is another example: *We are trying to immediately solve any customer-service problems that arise.*

Transposing *to* and *immediately* confuses the meaning—*immediately* seems to modify *are trying.* Placing *immediately* after *solve* makes the sentence stilted. And moving *immediately* to the end of the sentence is no good, because there it appears to modify *arise*.

With split infinitives, the best bet is to steer a middle course. If you can avoid a split infinitive without altering meaning, introducing ambiguity, or interrupting flow, you should do so, advises Garner.

❸ **Never begin a sentence with *and* or *but*.** Go ahead and do it—you'll be in good company. The *Oxford English Dictionary* cites sentences beginning with *and* that date back to the 10th century.

A scholar in the 1960s, says Garner, studied the work of top-flight writers—H.L. Mencken and Lionel Trilling among them—and found that nearly 9% of their sentences began with *and* or *but*. Garner's own research has turned up similar results.

Some writers substitute *however* for *but* at the beginning of a sentence, believing that by so doing they're hewing to the grammatical line. What they're doing is stalling the progress of their prose. *But* at the beginning of a sentence keeps things zipping nicely along, while *however*—followed by its obligatory comma—is a verbal speed bump, jarring the reader and slowing him down.

❹ **Never write a one-sentence paragraph.** Varied paragraph length, like varied sentence length, is a hallmark of a skilled stylist. Writing a one-sentence paragraph is an excellent way to grab the reader's attention or emphasize an important point.

Just don't overdo it. ❑

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FURTHER READING

A Dictionary of Modern American Usage
by Bryan A. Garner
Oxford University Press ♦ 1998

WEB RESOURCES

To access two modern usage guides, *The American Heritage Book of English Usage* (1996) and *The Columbia Guide to Standard American English* (1993), as well as two classics, William Strunk, Jr.'s *The Elements of Style* (1918) and H.W. Fowler's *The King's English* (2nd ed.; 1908), go to

www.bartleby.com/usage/

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Harvard Management Communication Letter
A Newsletter from Harvard Business School Publishing
Tools, Techniques, and Ideas for the Articulate Executive

Article Reprint No. C0407D

How to Engineer Compelling Prose: Teaching a Techie to Write

by John Clayton

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How to Engineer Compelling Prose: Teaching a Techie to Write

Every manager can help technical types translate their knowledge into actionable business communication.

by John Clayton

AN ENGINEER, THE OLD JOKE GOES, is the type of person who would rather take a telephone apart than use it to call his mother. This bit of humor actually reveals a truism of the engineering world: sometimes, engineers' close attention to how an object works causes them to overlook the object's larger relevancy.

This focus on analysis and understanding helps the engineer in his job, but it can stymie you in yours as his manager. Say you want to make a compelling case for a bigger chunk of company resources. If the technical members of your staff can't persuasively articulate how their proposed projects will translate into bottom-line business payoffs, your bid is going to be dead in the water.

Fortunately, there are strategies you can employ to help engineers and other technically inclined types on your staff create clear, cogent prose.

Why they write that way

Engineers' personalities and education deserve credit for work that has greatly improved our lives. Their accomplishments have come largely from manipulating *things.* Thus, to them, the object is paramount, says professor Daniel Ding of Ferris State University (Big Rapids, Mich.), who specializes in technical and science writing. It's what they work with, design, and control. Engineers' language naturally reflects such concerns, which can lead them to construct wordy, noun-filled, passive-voice sentences such as "The 10-32 1-3/4 inch wood screw was driven into the hickory with a Phillips head screwdriver 5-3/4 revolutions."

Moreover, engineers tend to organize their thoughts around their understanding of a system. But their nonengineer peers and managers care less about the objects that make up a system and how the system works than they do about what that system as a whole can help them accomplish.

Engineers also are often reluctant to try to convey ideas to those outside their field because they are unsure how to communicate with those who lack specialized knowledge. "We all stay within a comfort zone," notes Barbara Bryan, a trained engineer and independent business writer in Billings, Mont. "With engineers, that means they may have little experience talking plain English to everyday people."

Thus engineers have a difficult time understanding how to write for other audiences, says Ron Tulley, who teaches writing to engineering students at Case Western Reserve University in Cleveland. "There's a vast difference in expertise between engineers and any other audience. And they have a big fear of 'dumbing down.'"

As well, some engineers and other technical specialists are uncomfortable working in what they perceive as the subjective field of writing. Technical work is a complex, highly rules-based enterprise. Writing well is also a complicated endeavor but one whose rules are decidedly less absolute. Thus engineers, accustomed to their cut-and-dried world, hesitate to labor in a less objective discipline.

Improving engineers' communication

To advance their business unit and further their careers, technical types sometimes have to communicate their specialized knowledge to a nontechnical audience. Here are four ways that a manager can help them do this:

1. Define the audience's needs for them.

"Engineers face the same problem as all of us," says Paul Anderson, director of the Center for Writing Excellence at Miami University of Ohio (Oxford, Ohio). "How do we talk about what we do in ways that are useful to others?" Engineers are used to answering questions from other engineers, but managers typically ask questions that serve different needs. So you must articulate those different needs. Once engineers understand what a reader wants, Anderson says, they find constructing individual sentences easier.

For example, say a metallurgist at an auto company has been researching why a prototype's piston rod continues to break. She may be tempted to present her results as if she were addressing an audience of other metallurgists, using specific terminology and framing her results to satisfy the questions other specialists in her field might have.

But discussing the piston rod's metallurgic properties won't help design engineers, who seek information about redesigning the system, nor would doing so aid managers, who want to know how long the problem will take to fix and which processes will be affected.

The more managers can identify which questions need to be answered, Anderson says, the more successfully engineers can rise to the challenge on their own terms. "Focus on usability, not readability," he says. Engineers are more familiar with the concept of how readers can use documents than they are with what seems to them the vague concept of readability.

How do you make readers' needs more concrete? You might try creating a representative reader, one you describe in detail. Alan Cooper, author of *The Inmates Are Running the Asylum: Why High-Tech Products Drive Us Crazy and How to Restore the Sanity* (SAMS, 1999), suggests introducing engineers to a persona—a hypothetical but specific audience member. Since engineers love the tangible, he advises using specifics, including a name and a face, to make that pretend individual distinct. "For example, we don't just say that Emilee uses business software. We say that Emilee uses WordPerfect Version 5.1 to write letters to Gramma… [and drives] a dark-blue 1991 Toyota Camry with a gray plastic kid's seat strapped into the back and an ugly scrape on the rear bumper."

To communicate better with engineers, adopt some of their language.

2. Probe.

When technical specialists are uncomfortable addressing nontechnical audiences, sit down with them and ask the types of questions that will elicit the responses you're looking for. "I keep asking questions to get them down to the appropriate level," says Bryan. "What's the assumption under that? How did you get from point A to point B? Will your audience understand that word?"

Case Western Reserve's Tulley agrees. "Interaction with others is the only way" to help engineers reach beyond their disciplines, he says. "It's just practice, practice, practice."

3. Help them structure the document.

When Bryan edits engineers' reports, she says, "I usually have to reorganize." A need to restructure often results because the writer did not use any sort of an outline. (Or he wrote the outline as a last step.) For instance, factual information may appear in the "Recommendations" section, or vice versa. Bryan finds this problem ironic. "The same engineer who mixes up parts of a report on a ground water study wouldn't dream of completing the steps of the study haphazardly," she says.

A manager can help a technical specialist structure his writing by providing an outline or a sample document that serves as a template. The writer can use such a concrete, tangible model in much the same way as he uses a set of formulas or follows certain rules, knowing that they work because they're proven.

Managers also can increase their effectiveness in communicating with engineers by adopting some of their language. What if, when handing over that outline, you called it a flow chart? Most engineers are familiar with flow charts, which detail the steps they need to take to move from an initial state to a desired outcome. In essence, that's what an outline does. So why not frame it as such?

4. Help them edit and format their work.

You can help technical types achieve strong, unambiguous writing by working with them to eliminate jargon and edit unclear sentences. The first draft of a report may contain too much technical language and too many passive-voice constructions, as well as too few and/or too many disclaimers. That doesn't mean the report's ideas are not sound.

Simple rules exist on how to eliminate the passive voice, for example, or how to substitute smaller words for bigger ones. Furthermore, computerized word-processing tools, while far from perfect, allow such rules to be applied quickly and comprehensively. But this best done after the rough draft is complete—there's no need to get the writer bogged in too many details until she has got something down on paper.

Once the document is nearly complete, help the writer format it so that its information is more accessible. Highlighting the most important ideas with headings, lists, and boldface can help drive home the points that you want the document to make. An added bonus is that such formatting can distract from weak supporting prose. ❃

Further Reading

Technical Communication: A Reader-Centered Approach
Paul V. Anderson • Heinle • 2003

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