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Communication Reference Guide

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# Introduction

The purpose of this document is to share an overview of language and tone, in formal ION communication. Any communication done for/with team members, stakeholders, clients, and colleagues is considered formal in nature.

How to use this document?

1. Read it and re-visit it. Keep in on your desktop for ready reference.
2. Create a copy and keep adding aspects that you learn in your technical/functional induction.
3. Ask questions from the trainers and managers/mentors to contextualize this document to your needs.

# Definitions

Tone

Tone is the attitude your document, e-mail, or message employs. Just like tone of voice, tone in documents conveys more context than the words used.

For example, if your manager sent you a message that said, “Do you have a minute to talk?” you might think, “Oh no, what’s wrong?” If she rephrased it as, “Got time to chat really quick?” you might be less alarmed.

The emotional response you take away from a message may not necessarily be the intention of the sender, but it still exists, and people will seek it out when reading.

Your tone may be neutral, skeptical, confused, descriptive, etc., but it is important to be mindful of the tone your message is conveying and to adjust it to ensure the message uses the appropriate tone.

Level of Detail

The amount of detail your writing should have depends on who you are writing to and the purpose.

For example, calendar invites require brief summaries, while requirement-specification documents need to be deeply detailed to ensure no features are missed. Another er example can be: If you need help on a task from someone who is unaware of the project’s details, then supplying context is essential.

Language

Language refers to the phrasing of the communication. We must always provide context while communicating to help our reader better understand our key messages. This means not taking for granted that your reader with already know about the issue being discussed and giving a brief background to them before moving on to the actual point of discussion.

Language may be formal or informal.

While communicating in a formal setting, be it over a document, mail or even a Teams message, it is imperative to be respectful towards the other person.

Degree of Formality

In our daily lives, we interact with a lot of people – teammates, managers, people from other teams, and in some cases representatives from other vendors and clients as well. It is important to ensure that we maintain the appropriate degree of formality in these conversations – for example we would be more formal in a conversation with a client than we would be with a colleague on our team.

# Scenarios

Requirement gathering/PBR

Tone: Descriptive, Analytical, Deterministic

Level of Detail: Highly detailed

Language: Formal

Degree of Formality: Moderate

Examples (good and bad)/Common mistakes:

Good:

As a back-office user, I want incoming trades booked by a trader using the front office application to be imported by the back-office system so that they can be settled.

Bad:

As a user, I want booked trades to be imported into my back-office system.

Common Mistakes:

* Not mentioning the reasoning behind the requirement
* Not being detailed enough – requirement documents should contain as low-level details as possible

Additional comments:

Requirement documents are required to be used not only while developing a feature but often months or years later when a bug is discovered in the feature, or when the team is discussing changing how an existing functionality works. One would want to refer to the old document to make sure no scenario is missed while updating the functionality – which often requires understanding WHY a feature was implanted the way it was implanted. So, be sure to make the document as detailed as possible.

Additionally, remember that requirements need to be defined such that they can be translated into tangible tests to verify that a requirement has been implemented correctly.

Email communication with other teams in ION

Tone: Descriptive, Inquisitive, Respectful, Empathetic

Level of Detail: Brief overview followed by key messages; level of detail in key messages depends on the content of the communication

Language: Formal

Degree of Formality: Moderate/High

Examples (good and bad)/Common mistakes

Good:

Hi Platform team,

Happy New year!

I’m writing on behalf of Anvil team. We were working on a bug raised by our client ZXB and have stumbled on an issue with platform permissions. Since permissions are managed by a component maintained by your team, we were hoping to get some help with the same.

<Go on to describe the issue, include details like timestamp of the issue, particular loglines which made you think there’s an issue with the permissions, steps to reproduce the issue, etc.>

I have attached the logs to this mail. Could you please take a look and advise us on how to proceed?

Thanks,

<Name>

Bad:

Hi Platform Team,

We were working on an issue for a bug raised by one of our clients where they said that the user was not able to press the play button. It looks like an issue with permissions.

Logs are attached for you to investigate.

Thanks.

Additional comments:

These communications are usually when your team’s project needs to integrate with another team’s work, or an integration already exists, and you want to address an enhancement or a bug in this integration. Good chance that teams are collaborating with multiple teams in parallel – so it is always a good idea to provide context at the start of these communications to ensure everyone is on the same page.

Additionally, be sure to collect as much information as you can beforehand, especially in case of bugs. It shows you respect the other team’s time and want to get the issue solved and are not just dumping it in their backlog to clear yours. Always remember that a human being is going to read it and act on it. So, tone/empathy is very important in these.

Email communication with third party vendors such as Goldman, Reuters, etc.

Tone: Descriptive, Purposeful, Respectful

Level of Detail: Brief overview followed by key messages; level of detail in key messages depends on the content of the communication

Language: Formal

Degree of Formality: High

Examples (good and bad)/Common mistakes

Good:

Hi Bloomberg Team,

Hope you’re well. I’m writing on behalf of the FX team at ION. We were hoping to get your help with an urgent issue being faced by our mutual client, IFB Bank. They seem to have booked a trade on your system yesterday, but our system shows it never received the same.

<Go on to describe the issue, include trade identifiers and other required details>

Request you to please look into the matter and let us know if we can help with any further details.

Thanks,

<Name>

Bad:

Hi BBG,

IFB Bank booked a trade on your system yesterday, but your system didn’t send it to ours. What’s going on? Please take a look and get back to us.

Common mistakes:

* Not including details in the first go
* Not using screenshots
* Not providing context

Additional comments:

Communications with third party vendors are a lot like communications with other team, with an added layer of confidentiality and formality. Always be sure to proof-read these emails because you’re representing the entire organization and be sure to not reveal any details that are intellectual property of the company. Just like internal e-mails, an empathetic tone is important in these mails as well.

Updating Knowledgebase on confluence

Tone: Descriptive, Illustrative, Simple

Level of Detail: Very high

Language: Formal

Degree of Formality: Moderate

Examples (good and bad)/Common mistakes

Good:

1. Open WSS UI
2. Go to File -> New Booking -> Trade
3. Enter the amount and appropriate counterparty
   1. Use CLR for trades that should be cleared
   2. Use BOS for all other trades

<Insert screenshot of the New Trade UI>

1. Click “Book Now”

* [Example document](https://confluence.iontrading.com/pages/viewpage.action?pageId=227936863)

Bad:

1. Open New Trade UI on WSS
2. Book the trade for clearing

Common mistakes:

* Assuming the reader will have context

Additional comments:

An ever-evolving knowledgebase is the core of any team. Confluence pages contain knowledge of all kinds written in the form of articles and how-To's. They may be used to store standard team processes, instructions to perform specific tasks, as well as troubleshooting guides for internal tools used within the company.

Include screenshots and organize their hierarchy to make logical sense. These pages usually have a very long life and should be as detailed as possible so that even someone reading 10 years from now is able to understand the message and the team does not lose knowledge to time. Additionally, it’s very important to remember the DRY principle – “Don’t Repeat Yourself.” Provide links to other pages instead of writing the same in multiple places because it leads to the future possibility that the information is edited in only one site and not others – leading to inconsistent and outdated information.

Writings comments on Jira/Remedy for escalating issues

Tone: Descriptive, Purposeful, Respectful

Level of Detail: Brief overview followed by references (in the form of files, screenshots, related tickets)

Language: Formal

Degree of Formality: Moderate/High

Examples (good and bad)

Good:   
Hi Dev team,

We need help regarding an issue with our client ABC’s orders not being populated in the exported file at EOD. We believe this might be due to orders being placed during fill extraction.

User PQR100 placed order (OID: 5731436) on 6th Jan which was filled at 17:15:27 UTC. This fill, however, was not updated in the TraceFile. Please find attached TraceFile and system\_data.zip herewith. Please revert on the ticket if any information is required for further investigation.

Can you please check the issue and advise?

Reference ticket: INC001711600

Bad:  
Hi Dev team,

Client ABC’s orders are not reflecting the export file. Please check the issue in ticket INC001711600 and advise further.

Additional comments:

Provide context to your request. Our aim is to share knowledge with the respective team, inform about past proceedings, provide action points. Also, share references in case more information is required.

Documenting knowledge on Jira/Remedy

Tone: Descriptive, Informative

Level of Detail: High

Language: Formal

Degree of Formality: Moderate

Examples (good and bad)

Good:  
Our network team has investigated and found that today’s Nasdaq disconnection incident relates to ten DC power failure issue that occurred in New York last night. It has been resolved by re-routing the US traffic to the exchange via our UK DC. This failover will last till EOW, after which, network team will switch back the IPs of the 2 DCs.

Bad:  
US traffic failed over by NOC to UK DC. Exchange is connected successfully.

Additional comments:

Any piece of knowledge documented on Jira should be:

* Relevant to the topic
* Easy to follow (i.e., in continuation with the previous comments)
* Detailed, so that anyone referring it can understand the issue and resolution.

Add your comments on Jira/Remedy keeping in mind that these tickets may be used for future reference or as knowledge database.

Regular/Usual email communication with the client

Tone: Confident, Considered, Respectful

Level of Detail: Moderate

Language: Professional, Formal

Degree of Formality: High

Examples (good and bad)

Good:  
Hi Mark,

Please note the following findings:

* Order was filled at 05:34:27 (SGT)
* Order was successfully executed at ION end; we verified from our backend and from the screenshots shared by you.
* There was no disconnection at ION side.

May I suggest checking in with your network team on the network disconnection. Please reach out if any further clarification is required.

Regards

Bad:  
Hello Mark,

We have checked and can confirm that we did not have any network disconnection. Please check at your end.

Thanks,

Additional comments:

Be professional even if you have a cordial relation with the client. Do not let the communication become informal.

How would you respond to a second or third email from the client?

Tone: Polite, Respectful, Patient

Level of Detail: High

Language: Formal

Degree of Formality: High

Examples (good and bad)

Good:

Hi Paul,

Our network team has enabled the UAT connectivity for your environment last weekend. I have completed the application side deployment for the UAT; however, a couple of things are missing for the configuration. Kindly help to get this clarified:

1. Will the connectivity details shared by you on 15th Dec be used for DCE, INE, or both? If both, could you please share InvestorID, BrokerID & UserID for DCE & INE separately?
2. Separate IDs are needed for trade route setup.
3. Based on your production setup, we noticed that the provided connection details are public IPs. Based on the proposal signed, there should be VPN connectivity. Please share the NATed IPs.

Regards,

Bad:

Hi Paul,

* Connection details shared by you consisted of public IPs.
* IDs shared for DCE & INE trade route setup need to be separate.

UAT connectivity is already enabled in your environment. Please get back to us with the correct information regarding the above issues so that we can proceed with your production setup.

Thanks,

Additional comments:

If the client is chasing for an incident, be patient and understanding. Provide details of the proceedings so far, and the reason for delay (if any). Do not blame the client. State your points in a neutral and respectful manner, with the intention of getting the issue resolved.

Minutes of Meeting

Tone: Formal

Level of Detail: High

Language: Structured

Degree of Formality: Conversational

Examples (good and bad)/Common mistakes

The purpose of the MOM is twofold:

1. Document the progress, action points/next steps
2. State clearly the people accountable for the next steps

Additional comments

The following format is a general indicative format. Different teams have their specific versions. Please check with your manager/mentor.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Discussions Points/Tasks | Who will do the needful? | Who will review? | Timelines | Added notes/comments/questions |
|  |  |  |  |  |
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Making requests to manager

Tone: Formal

Level of Detail: Moderate

Language: Respectful, Polite

Degree of Formality: High

Examples (good and bad)/Common mistakes

Context:

You need to ask for feedback on your probation period. The manager has not setup any time yet. You write to him/ping him to ask for his feedback.

Good:

Hi ABC,

Thank you for sharing the probation review form. Attached the duly filled form in this email. I am keen to have a conversation around my work in the past months. Could you please let me know when I can setup some time with you?

Bad:

Hi,

The feedback form is attached. Can we meet to discuss further?

Additional comments

-Don’t assume that you will always get immediate responses.

-Always proactively share contextual information/documents as they case may be.

-When you have questions/need help, be explicit.

Making to HR/Finance/Admin/etc.

Tone: Formal

Level of Detail: High

Language: Polite

Degree of Formality: High

Examples (good and bad)/Common mistakes

The most common mistakes are:

-People assume that support functions remember everyone, all the time. Please share your Connection ID, Team etc. while writing to these functions to make responses easier.

-Always attach documents/drafts that you want verified. E.g., If you have a question on your salary, attach the slip to make comprehension easier for the concerned person.

-Last minute emails may be missed. Please ping the person concerned, referencing your email after some time if the matter is urgent.

# Conclusion

This document gives you a foundation to start thinking about communicating effectively in different situations. By no means is this document exhaustive, but some general points that should be remembered as a thumbs rule are:

1. Assumptions can be very difficult to deal with, so avoid assuming and asking instead. Multiple communications on a subject versus thoughtful comprehensive messages can sometimes make a big difference
2. Tone and detail orientation can make a difficult message easier to understand.
3. Official communication always warrants formal language.
4. Going through different situations with different kinds of people is the only way to build an effective repertoire of language and messaging.

# Disclaimer

This document is only meant for learning purposes as part of Graduate Induction program in India. It should not be used as a reference for any external circulation.

