abe

Diploma

in

Business Administration

Study Manual

BUSINESS COMMUNICATION

ABE Diploma in Business Administration

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Contents

Diploma in Business Administration – Part 1

Business Communication

Syllabus

Aims

1. To enable students to maximise their personal business communication skills necessary both within the organisation and for communication with external audiences.

2. To provide students with an opportunity to appreciate the internal mechanisms needed for business communication and how to ensure that these are effective.

3. To be able to deal with different types of data, particularly for the purposes of presenting information that is visually appealing and professionally produced.

4. To fully understand the role of Information Technology in the business communication environment and the efficiencies that these opportunities bring to the world of work.

Programme Content and Learning Objectives

After completing the programme, the student should be able to:

1. **Business Communication: Background and Theory**

   In this section students will achieve the ability to:

   ● Understand the communication process, barriers to it, techniques for overcoming them and for assessing the effectiveness of communication.

   ● Acknowledge the different modes of communication, including face-to-face interactions, letters, memos, telephone contact, electronic mail, the Internet and video conferencing and assess the relative advantages and disadvantages of each one.

2. **Written Communication: Modes of communication and Computer Software applications**

   In this section students will achieve the ability to:

   ● Produce and use appropriately a range of written communications including electronic mail messages, memos, letters, briefs, direct mail, reports, press releases and job descriptions.

   ● Understand the key elements of word processing including, page layout, typefaces and fonts and printing and other software computer applications.

3. **Oral Communication: Presentations and Visual aids**

   In this section students will achieve the ability to:

   ● Understand the purposes of presentations and speeches and how to prepare for their delivery.

   ● Demonstrate the choice and use of visual aids.

   ● Appreciate how to effectively use the telephone and the importance of listening

4. **Visual Communication 1: Logos, Graphics and Multimedia**

In this section students will achieve the ability to:

- Identify the use of visual communications in the presentation of information, including the role and value of graphics and multimedia.

5. **Visual Communication 2: Using Statistical Data and Information**

In this section students will achieve the ability to:

- Understand basic statistics and how to organise this data into statistical information as part of a visual presentation.

6. **Meetings and Interviews: Structure, Content and Listening**

In this section students will achieve the ability to:

- Identify different types of meetings and interviews.

- Understand the formal structures, procedures and documentation necessary for successful meetings and interviews.

7. **Information Technology and Business Communication**

In this section students will achieve the ability to:

- Understand the use of information technology in business organisations, including telecommuting, workgroup computing, bulletin board systems, commercial services and use of the Internet, including global perspectives such as the world-wide web.

- Appreciate the value of personal computing in Communication, including word processing, desktop publishing, electronic publishing and presenting and organising and gathering information via spreadsheets, databases and browsers.

8. **Input through Computer Hardware**

In this section students will achieve the ability to:

- Appreciate the use of input devices such as the keyboard, pointing devices and scanners.

9. **Output through Computer Hardware**

In this section students will achieve the ability to:

- Understand how output devices work, such as screen displays, large computer systems and microcomputer systems.

Method of Assessment

By written examination. The pass mark is 40%. Time allowed 3 hours.

The question paper will contain:

Eight questions from which the candidate will be required to answer any four. All questions carry 25 marks.

Reading List

Essential Reading

- R. H. Sheldon. *Business Communications,* Peter Andrew – ISBN 094676505

Additional Reading

- Ludlow, R. and Patteson, F. *The Essence of Effective Communication*; Prentice-Hall

- Capron, H. L. *Computers: Tools for an Information Age*; Addison-Wesley

- Bergin, F. *Practical Communications*; Pitman

- Stevens, M. *Improving Your Presentation Skills*; Kogan Page

Study Unit 1

Principles and Methods of Communication

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INTRODUCTION

In order to achieve effective business communications you must understand the context in which communications take place and identify all the elements which contribute to successful communication. We start, then, by considering the nature of communications in business organisations and move on to examine the basic principles of the communication process.

Finally, here, we go on to consider the key factors which influence the effectiveness or otherwise of communications. There are many things that can get in the way of successful communications and we shall look in detail at these, including a case study where you can use the understanding you have gained to identify barriers to successful communication in a real-life situation.

A.   PURPOSE OF BUSINESS COMMUNICATIONS

No organisation exists solely in isolation with one member who has no contact with anyone or anything. The exchange of ideas, information or instructions is a fundamental feature of all organisations. This exchange may take place internally between different sectors or departments, or externally with other organisations. The purpose of business communications is to understand more fully how this process functions most effectively. At an individual level, using the correct formats for letters, memos, reports, or the correct language or approach in oral presentations, telephone calls, meetings or interviews, will be an accurate representation of how an organisation organises and communicates.

Information can enter an organisation in a variety of ways:

- personal experience of staff;

- newspapers and print media;

- television;

- from customers and competitors.

How information is transmitted externally and utilised effectively internally will be crucial to the organisation's success.

The main focus of business communications is to:

(a)   give out information;

(b)   make your ideas understood;

(c)   initiate some action;

(d)   share ideas, attitudes, beliefs;

(e)   establish links with other people.

Role of Organisational Structure and Culture

Organisations can be made up of one person or thousands of people. How these people do their jobs and how they communicate depends on the structure and culture of the organisation.

Organisational structure is the formal arrangement of people in their roles and areas of responsibility and authority. Staff can be organised on a functional, production, regional, divisional or even on a matrix basis.

An organisation's culture can be defined as *"the corporate personality"* or *"the way things are done around here"*. It is characterised by the degree of formality and adherence to rules which can be demonstrated in the way people communicate and even in the way people dress.

(a)   Power Culture

This is often developed from a "one man band" or entrepreneur. One person will control all communications within the organisation and may deliberately encourage or block certain information.

(b)   Role Culture

Information passes from the top down to clearly defined departments, to people with clearly defined responsibilities. This can aid initial communication but may result in a delay in activity if several groups have to be involved. This type of culture is often found in bureaucratic organisations such as local government, the Civil Service, banks, etc.

(c)   Task Culture

Here teams of people will work together on particular projects in problem-solving groups according to personal expertise rather than status. This can be confusing as staff may have to work with different people each time they are involved in a new project. The pattern of communication may resemble a wheel, with a strong project leader at the centre but with effective communication channels between team members at the rim. Such a culture is often found in market-led firms, e.g. project teams on an oil rig, on an aerospace programme or on a building contract.

(d)   Person Culture

The most important factor here is the personal needs of the staff – their individual growth and development.

As decisions are reached by consensus, this organisation usually functions best where there is an exchange of creative ideas, e.g. in a small design partnership. Sometimes a particular department of an organisation will appear to function in this way, although it will still have to report to other levels of management.

The structure and culture of an organisation can therefore have a profound effect on the process of business communications. Knowing how an organisation is structured and its type of culture will help you to understand the pattern of communication and even identify the right person with whom to communicate and/or the most appropriate channel of communication.

Communication Systems Within and Between Organisations

The formal communication system in an organisation sets out the command structure and the inter-relationships between the departments within it. A company organisation chart in either a company brochure or company report will usually outline the chain of command and responsibility and hence indicate the likely information flow within that organisation.

Flows of communication within an organisation may progress downwards, upwards, horizontally or diagonally. The organisational chart which illustrates the formal communication system will also indicate lines of accountability and the direction in which communication flows within the organisation (see Figure 1.1). When working in a matrix or people-centred organisation, it may be necessary to draft an organisation chart for yourself so that you can clearly see how information flows are managed.

```
                    ┌─────────────────────────────────────┐
                    │   Chief Executive/Managing Director  │
                    └─────────────────────────────────────┘
         ┌──────────────┬──────────────────┬──────────────┐
    ┌─────────┐    ┌───────────────┐  ┌──────────┐  ┌───────────┐
    │ Director│    │   Director    │  │ Director │  │  Director │
    │(Finance)│    │(Sales &       │  │(Production)│ │(Personnel)│
    │         │    │ Marketing)    │  │          │  │           │
    └─────────┘    └───────────────┘  └──────────┘  └───────────┘
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Controller	Controller	Controller	Controller	Controller	Controller	Controller

Operational teams and subordinates
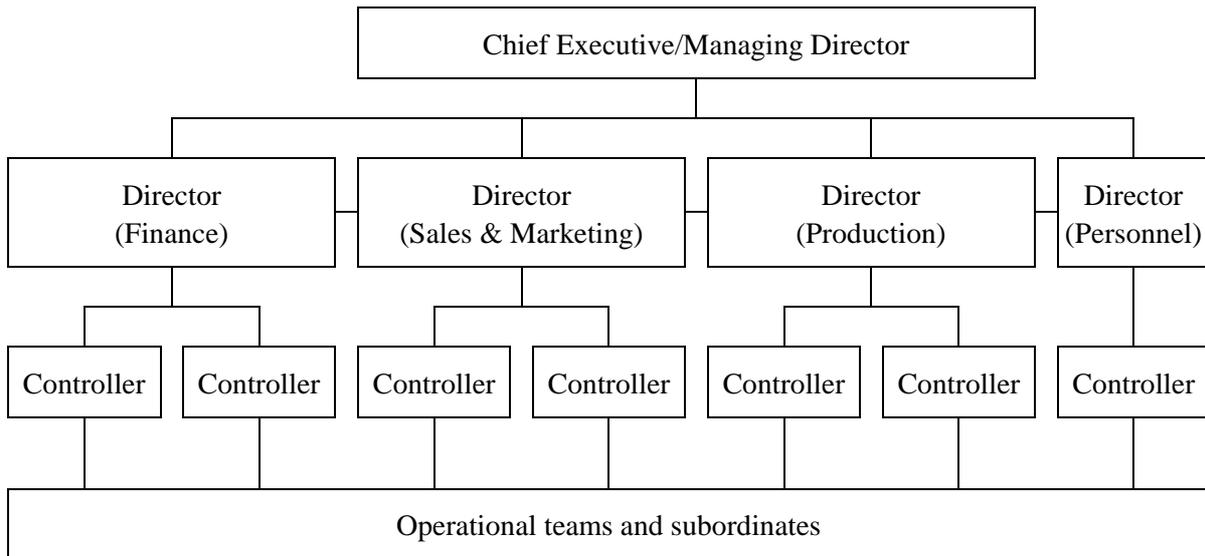
Figure 1.1: A Simple Company Organisation Chart

The formal communication system is usually in written form but need not necessarily be so – meetings, conferences and presentations may all use oral and visual skills within a formal context.

The following diagrams illustrate how communications flow within organisations from the perspective of a middle manager.

(a)   Downward vertical flows

These are usually in the form of verbal or written messages. Verbal messages are usually planned, intending to communicate a clearly defined set of instructions or information. The written messages will usually be contained in memos, or notices of staff meetings.

Senior Management

↓

Middle Management
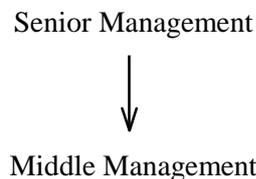
Figure 1.2: Downward Vertical Flows

(b)   Upward vertical flows

These are used to convey information from lower staff levels to management (see Figure 1.3). They can take the form of progress reports or reports of grievance procedures. In a bureaucratic organisation they will almost always be in written form. There may also be a "house style" determining exactly how such written reports are presented to management.

Senior Management

↑

Middle Management
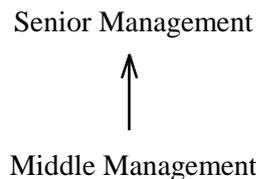
Figure 1.3: Upward Vertical Flows

(c)   Horizontal flows

These take the form of the proceedings of cross-functional, problem-solving teams as found in the task or people-culture organisations. They may occur at formal or informal meetings within the functions or they may be responses to or requests for information.

Senior Management

Middle Manager   X ⟷ Y ⟷ Z
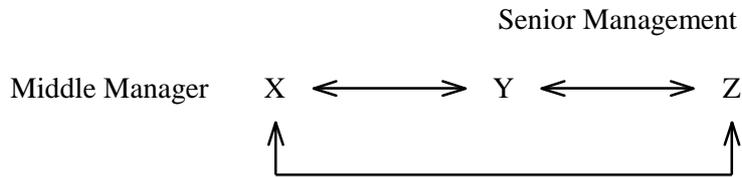
Figure 1.4: Horizontal Flows

(d)   Diagonal communications

These may take the form of formal meetings or informal conversations. They often relate to "fire-fighting" activities and cross-functional problem-solving. They may represent a move to co-ordinate the roles of two or more sectors or departments in particular issues. Diagonal communications can also be viewed as an attempt to improve internal communications so that the passing of information and ideas is not restricted to and from management or along the same levels of responsibility.

Senior management

A   B   C   D

Middle management

1   2   3   4   5   6   7   8   9   10   11   12

(i)   (ii)   (iii)   (iv)   (v)   (vi)   (vii)   (viii)   (ix)   (x)   (xi)   (xii)   (xiii)   (xiv)

Subordinates

------------------------------   Usual reporting system

————————————   Diagonal flow for specific projects
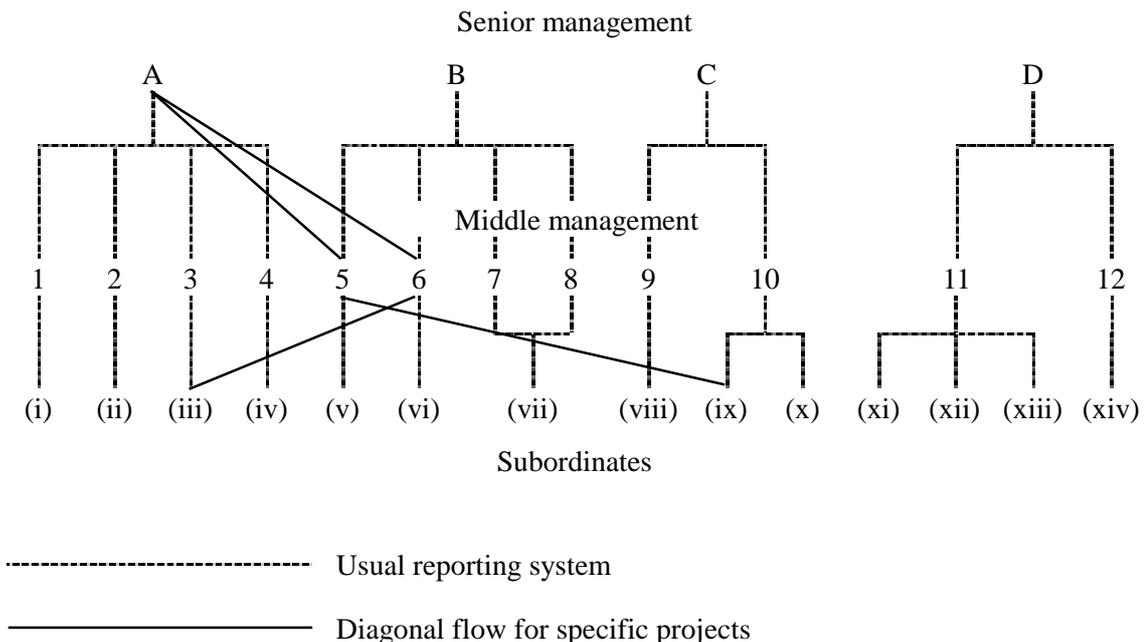
Figure 1.5: Diagonal Flows

The example of diagonal communication in Figure 1.5 shows middle managers 5 and 6, who usually report to Senior Manager B and employ subordinates (v) and (vi), now working with Senior Manager A and subordinates (iii) in Department A and (ix) in Department C.

Informal communication systems tend to co-exist alongside the formal structures that are established by management. In this way like-minded individuals form networks and information is communicated as people chat during tea breaks, over the photocopier and as they pass in corridors.

Such informal networks arise due to social needs and to fill the information gaps left by the formal system.

When the informal network has grown to such an extent that information is more regularly communicated through the informal rather than the formal routes, so much so that staff are not formally informed of events affecting them, or the organisation is characterised by rumour and gossip (known as the "grapevine"), then it is clear that the formal structure is either inadequate or has broken down.

It is the role of managers to ensure that poor internal communication does not exist as it can lead to mistakes in customer service, poor industrial relations, stress-related illness and reduced levels of staff performance.

B.   THE COMMUNICATION PROCESS

The Need to Communicate

How is information exchanged?

A simplistic model would be as follows:

Feedback to sender if possible or appropriate
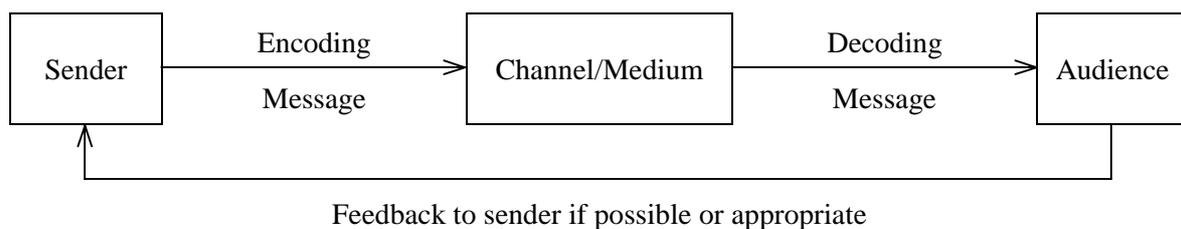
Figure 1.6: The basic communication process

In order to send our message, it is clear that we need an understanding of the role/function of the communicator and audience, and then we can select the appropriate channel of communication. There will also be feedback from us, as communicators, to the audience. Communication should at least be a two-way process and it is important to remember that you communicate **with**, and not **to**, an audience. However consumers often cannot respond to the advertising campaigns seen in the mass media.

Effective communication needs to be planned; organisations, and individuals within them, must identify not only **what** they want to communicate, but **with whom** and **why**. Information will always be communicated within or between organisations, which are themselves networks of communications.

This model does not illustrate how the communicator and audience will in turn respond to the communication within their own organisation.

The stages of the communication process are as follows:

- The need to communicate a message   *Why*

- Encoding   *"Writing" the message*

- Transmission   *Sending the message*

- Selecting the communication channel   *How to send*

●   Decoding   *Understanding*

●   Interpreting and feedback

Encoding and Transmission

What is the message?

Given that all participants in the communications process have their own unique perspective, it is up to the communicator to make sure that the message accurately reflects what is intended and is then presented in the most suitable format.

Any ambiguity in the message will automatically hinder communications, as the following examples show:

> *"Long haired boy suspended by head."*

> *"We've recently reduced our staff."*

> *"The peasants were revolting."*

Complicated phrases or jargon are usually inappropriate, e.g.

> *"We would be best to facilitate the removal of superfluous stock at our earliest convenience."*

Why not:

> *"We need to get rid of our excess stock as soon as possible"?*

Clarity of purpose, message and delivery are essential elements of effective communication. Lack of planning or preparation, particularly when telephoning or talking to someone, reflects not just on yourself but on your organisation.

If you are clear as to the purpose of the communication then it is more likely that the person you are talking to will be:

(a)   The right person;

(b)   Able to discuss this matter with you at this time;

(c)   Prepared themselves so that information can be exchanged, not merely noted;

(d)   In a position to respond positively to your communication.

Channels of Communication

It is important to ensure that you use an appropriate channel or medium to communicate with a target audience. There are various methods of communicating with a target audience:

●   **Face to face** – meetings, interviews, presentations or informal discussions, etc.

●   **Oral –** using the telephone, voice mail and answer machines, etc.

●   **Written** – using letters, memos, reports, forms, fax messages, or E mail, etc.

●   **Visual –** using charts, tables, diagrams, slides, maps or notices, etc.

(a)   Internal Channels of Communication

      The processing of immediate information to individuals within an organisation will include telephone messages, internal memoranda or messages which will probably be written on headed paper to be kept as records of the correspondence later. These will be immediate

responses to other information received and be required by specified individuals in a very short time-scale.

Reports, briefs and summaries will be determined as to their format by the organisation and will be prepared for a specific audience to specific objectives and guidelines. (It is also expensive to send all information to everybody!)

House journals or newsletters might be appropriate if the intention is to contact all staff within an organisation and the information can be scheduled.

Meetings of interest groups or teams, or staff development activities or internal presentations will take place amongst small groups of identified staff, who share a common interest or need for particular knowledge or information.

Personal or personnel issues may well be dealt with orally. Formal procedures for written warnings, interviews and disciplinary hearings will be necessary.

(b)   External Channels of Communication

External channels of communication need not restrict information exchange to an external organisation. Corporate brochures, sales literature or any paid-for advertising is also accessible to those within the organisation. What is crucial to remember is that you may not want your internal market to gain information "second-hand" in this way. In terms of your organisation's success, briefing internally via house journals, magazines, staff meetings or newsletters should form part of the initial communication process prior to or coincidental with your external communication.

However, if external communications take the form of letters, telephone calls or reports, then it won't be necessary for everyone within your organisation to have copies! Key personnel in projects, departments or teams will, of course, need to be briefed as to ongoing communication externally.

In addition to the nature of the information to be sent, the cost of external channels of communication – particularly if they include advertising – is an important consideration.

Sending business correspondence second-class as opposed to first-class might, however, result in information being received too late and the business being lost.

(c)   Selecting the Channel of Communication

The choice of the channel of communication depends on a number of factors:

● The urgency of the message – the time-scale required to send information and to allow for a response

● Whether the information is to be transmitted internally or externally

● The size and location of your audience

● The nature of the information itself – particularly the complexity of the message

● The need for a written record

● Whether the message is sensitive or confidential

● The cost of communicating

● The need for interaction and feedback

Internal communication channels will be within an organisation's control. The communicator can make use of memos, house journals, bulletins, notice boards, meetings (formal and

informal), telephone calls or closed-circuit television. The recipients will be familiar with the context, background and language used in the communication.

Externally an organisation has many publics with which it communicates – shareholders, employees, customers, creditors, governments, local communities and agencies and a variety of opinion-formers. There will be a preferred channel applicable to each. Apparently informal verbal channels or "word of mouth" can be as important to an organisation's reputation as formal channels like company reports or brochures.

Individual contact with an organisation can be more effective than broadcast media, where the message is diluted and standardised to suit many rather than individuals. Newspapers are out-of-date almost as soon as they are printed, ready for the next news item. Clearly the time-scale of the communication will also determine the channel.

On a day-to-day basis, letters, faxes, telephone calls, reports and personal meetings will form the majority of business communications. However, sales and promotional literature, press releases, broadcast media, magazine and journal articles, presentations and trade conferences will all be used to transmit information.

The choice of channels should be kept under review to ensure that the most appropriate and effective is being used. For example:

- Are they still effective for that particular audience?

- Are they still cost-effective?

- Is there an appropriate evaluation mechanism to deal with feedback?

- Is the organisation using the right communicator(s)?

- Have company aims and objectives changed?

- Have the company's publics changed?

- Who are the current/new opinion-formers?

Decoding

Who is your audience?

Communication will also be determined by the status of your audience. In different contexts each of us has a different status and may represent different market segments: doctor, patient, mother, wife, husband, single parent, consultant, tennis coach, etc. The same message may be addressed to different audiences using differing language and channels of communication, and you will require the feedback to be different for your own internal communications. (See Figure 1.7.)

MESSAGE TO BE SENT: There has been an outbreak of scabies in the local area.

You represent the local health authority.

Audience	Message	Most appropriate channel
School teacher and head teacher	Could you please keep a lookout for signs of scabies in Class 4 and make parents aware of symptoms.	Literature. Possibly telephone call if cases continued to affect one school/class.
School secretary	Please circulate the following information to all teaching/non-teaching staff.	Local education authority department bulletin, enclosing relevant literature.
Doctor	There have been three cases of scabies in North Ward. Could you let me know of any in your practice?	Health Service bulletin.
Worried parent (who telephones your office)	There have been few cases, but if you're worried I'd recommend Derbac M available at the chemist and I'll send you an information leaflet.	Telephone call.
Local chemist	There has been an outbreak of scabies; you may need to stock Derbac M.	Memo to all pharmacists.
Local population	Detailed information on symptoms and treatment.	Information leaflet.

Figure 1.7

This also introduces the notion of **supplementary information** which may be necessary to take account of specialist interests.

Interpreting and Feedback

People are important. In dealing with organisations we sometimes lose sight of the fact that not only do we need to understand the organisational culture, but we do also actually communicate with people. Personal communication style can be as important in delivering a message as the selection of the appropriate channel.

Initial impressions are important but like all communications are not a one-way process. The person receiving the message will be responding to the communicator's style and vice versa.

The following chart (Figure 1.8) gives an indication as to the effect **non-verbal communication** can have on an audience. It will help you to think about the importance of body language in interpersonal communication and how it can be used effectively when communicating with others.

Body language	What people intend to communicate	What is communicated
Firm handshake	Strength, interest, commitment	Professional, businesslike approach
Limp handshake	Friendly approach	Lack of commitment Hesitancy
Good personal hygiene	Cleanliness	Acceptable standards
Poor personal hygiene	*"Take me as I am"*	Inattention to self. Probably not interested in business either.
Standing very close to the person you're speaking to	Trying to establish a rapport, being friendly	At least an invasion of personal space, at worst sexual harassment

Figure 1.8

Clearly the success of the information exchange can depend on the personal impression made by either the communicator or audience.

The general appearance of communicator and audience and the type of language used will also affect the communications process. Maintaining a friendly yet businesslike approach is what both parties should be aiming for. Final selection of words often depends on clues picked up during the course of conversation. This is why conversations between friends are very different from those between business partners or in business meetings.

(a)   Oral Communication

Speech is such a natural activity that we tend to speak first and think later. This casual approach could be a problem in business.

Speech should be viewed as a tool for accomplishing objectives. How to plan what to say, how to say it and manage the impression to be created will be ensured by tailoring remarks and delivery style to suit the occasion or situation.

(b)   Listening

An oral communication is unsuccessful if it does not include listening. Listening may result in better relationships and better understanding of those with whom we communicate; provide information; stimulate new ideas; and motivate others to improve their listening skills.

Later in this course we will consider telephone technique and oral presentations in more detail.

(c)   Feedback

The impact of a communication is like dropping a pebble in a still pond. The pebble will have an immediate effect but the ripples will continue for some time afterwards.

Feedback can take place immediately or over a long period of time; it may be the desired outcome of a series of communications which will take place over several months. Both

communicator and audience can respond to the feedback. It should be an effective valuation mechanism for the communication and the communication process alike.

C. KEY FACTORS FOR EFFECTIVE COMMUNICATION

Exactly what are we striving for when we communicate? It's not just about information exchange within and between organisations. The style of communication we use may depend on the importance we feel that the information, the contact, or the response may have. It may reflect the status and standing of all participants in the communication. It may be a supportive or subversive activity. It may be a chore rather than a pleasure. The sender will certainly vary his or her approach to the communication independently of the medium or message selection according to what he or she sees as his or her role in the process and that of the audience. Sometimes the communication may be directed at one audience but intended for someone with more power in the process. It could be an exploitation of formal or informal networks dependent on hierarchical status or actual power.

You can never entirely divorce a message from its sender, and will certainly pick up other clues and information from the sender's attitude.

Communication styles, then, vary according to the status, perception and attitude of the sender as well as the medium chosen.

Intentional and Unintentional Communication

(a)   Intentional Communication

When you write a letter, speak to a group or make a telephone call, you are deliberately attempting to transmit information, ideas or attitudes. This is an intentional communication.

(b)   Unintentional Communication

All the time you communicate intentionally, you are also communicating unintentionally. As individuals, we can never entirely assess what additional messages we are communicating, as these are influenced by the role, perception or status of those with whom we are communicating.

Even when we send a letter (intentional communication), the recipient will judge it on the type of language used, the typeface, the handwriting, the letterhead, the paper type or the spelling used within.

By not addressing the power of the unintentional communication and ensuring that the letter is accurate and reflects the organisation which sent it, the intentional communication is undermined.

Personal appearance may convey attitudes at odds with conversation. This may be refreshing at a dinner party but not at an interview or business meeting.

Similarly, body language and (dare I say it) etiquette are unintentional communication tools.

Personality Perception

People respond to each other as to their perceptions of each other's personality. As individuals we function as:

● The person we are.

● The person we believe ourselves to be.

● The person as perceived by others.

These three personalities are often significantly different.

Judgement and Concealment

Often we make a judgement about facts and information we come across. When we pass this information on to others we subconsciously make an "internal" judgement about what we feel is important. This may mean that some aspect is emphasised or played down (concealed) depending on whether we feel it is relevant or irrelevant.

Congeniality

The recipient of a message tends to be more attuned to the message if it is congenial to or confirms the person's own frame of reference, i.e. all the attitudes and presumptions that determine how a person perceives issues and events. It is almost like a filtering mechanism which blocks out "unacceptable" facts and opinions whilst reinforcing and embellishing information that is more "acceptable".

Rumour

Despite our analysis of intentional or unintentional communication, a rumour is the most effective form of communication within any organisation.

Sometimes rumours are intentional or unintentional leaks of information which become part of the organisational culture prior to any official statements being made. At other times they are unfounded but spread rapidly because there is fear and uncertainty and rumour supports existing speculations.

Certainly the rumour chain is like "Chinese Whispers" and the rumour will change form and tone as it is passed on through an organisation.

Rumours need to be substantiated or denied by persons in authority who have, and are acknowledged as having, access to the relevant (correct) information.

Status

The confidence that readers and listeners have in a communication is affected by the extent to which they believe the information and the credibility of the communicator. Much of this credibility is derived from perceived status.

Teachers are listened to because there is a perception that they are honest, objective and competent.

Estate agents may arouse suspicion because they are trying to make a large commission from the seller.

Within an organisation, key members have status conferred upon them according to:

● Position in the hierarchy

● Extent of technical knowledge (expertise)

● Ability to convey enthusiasm, sincerity and competence

● Prejudice concerning role, job title, gender, race, age

● Corporate image

It is important to identify who has status and how they have achieved it in order to ensure that communications can be effectively disseminated. (See Figure 1.8.)

How Do Relationships Within Organisations Affect Communication Styles?

Senior Management

instructs
supports
shapes corporate image/identity
sets targets/objectives

reports
is accountable
makes suggestions
supports

Middle management

contributes
suggests
co-operates

Steering groups
Committees

motivates, explains
requires, instructs
supervises
sets targets/objectives

Subordinates

develops
partnerships
requests
co-operates
competes

Y

X

Z

Other departments

Figure 1.8

Effective Feedback or Evaluation Mechanisms

Communication between and within organisations is constantly evaluated and represented. Unless there is a mechanism/process to deal with incoming or outgoing information, the communications become worthless.

It is important to record even informal exchanges formally. Many a politician has been caught out by not keeping notes of expenditure or of what has actually been said.

Most communications require some action, maybe not immediately, but it may well form the basis for later communications. This is particularly true if you are trying to research attitudes to your organisation, a particular product or a new concept. A gut feeling that *"people think -------"* is not nearly as relevant as *"80% of our clients"* or *"60% of our workforce believe -----"*.

Making notes on telephone calls, at appointments, in meetings, after informal meetings, filing letters and storing data on disc (correctly labelled for retrieval) are simple and effective ways of allowing feedback and evaluation to take place rather than a series of guesses.

Conclusion

Effective communication within and between organisations is dependent on human relationships and organisational contexts which influence manner, tone and style.

Information must be appropriate to the context and medium, accessible, clearly presented and attract attention because individuals receive so many messages and communications.

The credibility of an organisation is dependent on the communication style of the individuals who are its representatives.

Successful communications do not usually take place in a hostile environment.

We can summarise the key factors in successful and effective communications as:

- Relevance
- Accessibility
- Precision
- Attract attention
- Congeniality
- Credibility

D. THE BARRIERS TO EFFECTIVE COMMUNICATION

For a communication to be effective it is dependent on the nature and quality of the information which is being sent to the recipient. It also relies on the interpretation placed on the communication by both sender and receiver.

Because individuals differ so very much from each other it is helpful if, when we communicate, we understand the nature of those differences and modify our interpersonal behaviour to cope with them. However, this is not always possible if we have to communicate with a large and diverse audience which may differ in a number of ways, such as age, interests or culture, and we are unable to communicate with each of them on an individual basis.

In fact there are many barriers to successful communication and in Figure 1.9 you can see that "noise", or barriers to communication, can interfere with the encoding and decoding stages.
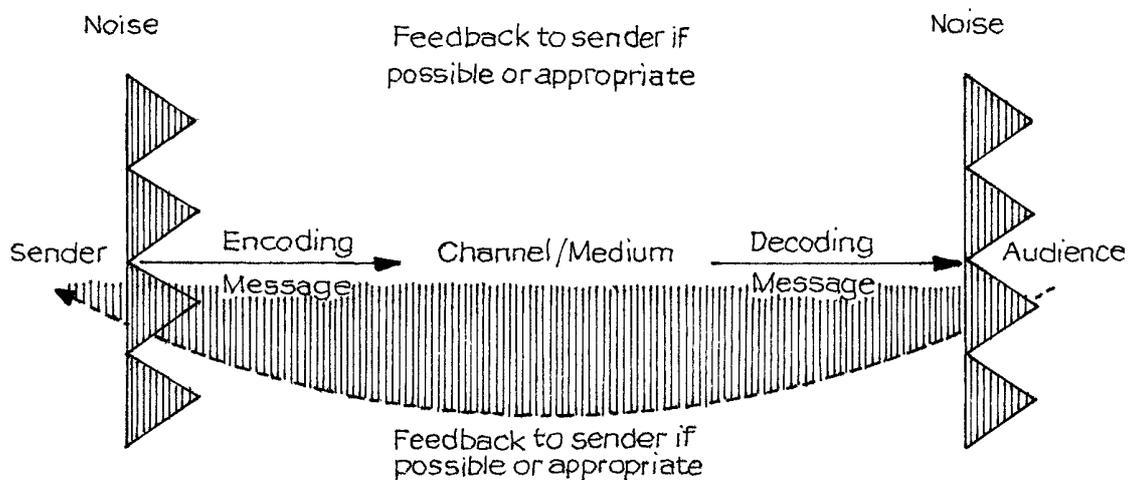
Figure 1.9

There are a number of potential barriers which may result in an ineffective communication, which in turn may cause problems in the workplace. These include:

● Irritation

● Misunderstanding

● Mistakes

● Conflict

Barriers to successful communication include:

(a)   Technical noise

For example, if a message is not received because of interference on a mobile telephone or because a fax machine is not working properly.

(b)   Physical noise

For example, if an office is too noisy because it lacks sound-proofing or a group is too large so they cannot hear what is being said in a presentation.

(c)   Lack of interest or hostile attitude

For example, if, during a sales presentation, an individual believes a product is not appropriate for his needs or feels strongly that his valuable time is being wasted, then the person's message will not get through what is essentially a very strong barrier.

(d)   Poor listening skills

For example, if a group of staff on a training course are not used to sitting down and concentrating on what is being said then their lack of listening skills might mean that the message is not successfully communicated.

(e) Information overload

For example, during a meeting a manager might try to give his audience a long list of facts and figures in a short period of time; this would mean that most of his message would not be communicated successfully.

(f) Lack of understanding

For example, if someone had a poor grasp of language and used incorrect words such as *"economically variable"* instead of *"viable",* or the person used technical jargon or abbreviations which were not understood by the audience.

(g) Psychological noise

For example, if a person at an interview said that he was very interested in the job being described but started to yawn and gaze disinterestedly out of the window as the interviewer was speaking.

(h) Perceptual bias

For example, if a person uses selective hearing and tunes out in order to avoid an unpleasant message or one that does not fit into his pre-existing attitudes and values. An employee listening to his line manager talk about the importance of team work and its benefits who was uncomfortable in the team he was currently working in would be likely to "block" the message.

(i) Poor timing

For example, telephoning at lunch times and on Friday afternoons may make it difficult to get through because the person you need to contact is unavailable; or if you are talking to someone in an appraisal interview telling them how long-term planning in the firm might affect their role, they are unlikely to be listening if they know that the next topic concerns their annual pay rise!

Sample Case Studies

Consider the communication barriers in the following situations. Think about the first example and review the suggested barriers set out at the end. Then move on to the second example and try and list the barriers yourself before reviewing the suggestions made.

Example 1

Sally Strict, the Office Manager in Telephone Ordering section, is nearing retirement and has very conservative ideas about the appearance of office staff and how they should behave.

Ben Brown, the new Sales and Marketing Manager, has a reputation as a "whiz kid" and has overall responsibility for the Telephone Ordering section. As a result of some last-minute direct response advertising which he placed last week, he realised that the section would be facing a very busy period over the next few weeks. Consequently, he made arrangements for a number of temporary staff to start the following Monday.

Early Monday morning, whilst on his way to a meeting, he telephones Mrs Strict from his mobile telephone.

*"Sall – girl, guess what, I've organised some temps because .... (*silence as he is in an area with poor reception*) ... anyway can't chat long because the telephone battery needs recharging ... back in the office on Wednesday."*

Mrs Strict is very annoyed. Before the telephone call she had already been called to reception to look after three young women from the local temporary staff agency. The young women were all students

looking forward to earning some money in their vacation. Two of them sat in their chairs yawning; the other one had very short cropped hair and a ring in her nose. She started to introduce herself but much to her surprise Mrs Strict said, *"I am very sorry but you must be mistaken. The Telephone Ordering section does not require temporary staff. If we did, I certainly would not want to work with you three."*

The communication barriers evident in this are as follows:

- **Technical noise** which means that Ben's message is interrupted and therefore incomplete.

- Mrs Strict's **hostile attitude** would mean that even if there had been no technical noise, it would have been difficult for Ben to communicate his message effectively.

- Mrs Strict's **perceptual bias** against the appearance of the three young temp staff would mean that, whatever they were to say or do, initially they would find it very difficult to communicate successfully as she is likely to be selective in the way she listens to what they say. Furthermore, they created **psychological noise** so that whatever positive message they wanted to communicate was contradicted by their appearance and body language.

Example 2

The following extract about Tyrone Crystal and Belleek Pottery comes from the Belfast Telegraph, 17 May 1994. Identify where you think there have been barriers to successful communication or a communication breakdown between Tyrone Crystal and Belleek Pottery.

INDUSTRY

Giftware rivals in 'talks move'

By MARTINA PURDY

RIVAL giftware companies Tyrone Crystal and Belleek Pottery held informal joint venture talks earlier this year, it has been claimed.

Business Telegraph can also reveal that Tyrone Crystal has closed its upmarket Boston store, and lost its regional US sales president to Belleck's subsidiary, Galway Crystal.

Martina Kerr-Bromley has joined Galway as manager of new business development.

She is the latest in a string of Tyrone executives to be recruited by Belleek. Other include Tyrone sales director Hugh Quinn. The store closure, which comes within two years of its opening, is related to a more efficient reorganisation of Tyrone's sales network and the appointment of distributor Cornwall Marketing.

Meanwhile, George Moore, Belleek's Irish American owner, admitted in an exclusive interview with Business Telegraph that infor-

mal talks with Tyrone had been held but denied he had tried to acquire the company.

"We are all friendly competitors," he said. "We like to talk about the future. We are not in any discussion with Tyrone about an acquisition. We were in friendly discussions about the market.

"We always wanted to do something with Tyrone Crystal. Unfortunately, we never achieved that."

But Paddy Duffy, chairman of the Dungannon and District Co-operative which owns Tyrone Crystal said he was unaware of such talks. He added:

"If I had informal discussions would you expect me to talk about them in the Belfast Telegraph?"

Mr Moore described the talks as a "one way street" indicating the approach for a joint venture was made by Belleek.

Mr Moore said it made business sense for both companies to jointly distribute and market their products.

"Tyrone and Belleek are two of the best products in Northern Ireland and unfortunately we never

achieved that (a joint venture)," he said. "Our competitors are outside Ireland so the more we can do together, I would be into. It will mean the survival of all the companies in the long term."

He admitted an interest in purchasing another Irish tabletop business, and refused to rule out further crystal acquisitions.

"I never rule out anything," he said. "We will look at any acquisition which makes sense in terms of our overall strategy."

Tyrone Crystal's Boston store, The Irish Crystal Company was opened with much fanfare in February 1992 by US Senator Edward Kennedy, and Ulster Unionist MP Ken Maginnis.

The store sold Tyrone Crystal and other Northern Ireland products.

Tyrone sales and marketing director Isabel Jenning said the store had helped the company to establish its presence in the area.

She said Cornwall would be able to market the products more efficiently and that about ten retailers in Boston were now carrying Tyrone Crystal.

The extract illustrates a failure in effective communications between the two organisations and also indicates that there may be internal communications problems which have manifested themselves as external barriers.

Prejudice, personality and misunderstanding seem to be the hallmarks of this communication.

It would appear that Belleek's Irish American owner had not identified Paddy Duffy, chairman of the co-operative which owns Tyrone Crystal, as an important person in the communications process. This indicates a lack of appropriate research and poor briefing.

Belleek are also interested in purchasing another *"Irish tabletop business"*. This may have been interpreted as a lack of interest in or commitment to Tyrone Crystal.

Tyrone Crystal may have had some internal communications problems as indicated by their reorganisation of the sales network and appointment of a new distributor.

Note also the communication medium used – the press. A further barrier to successful communication was to reveal information to the press without apparently discussing the issue between the two organisations.

Study Unit 2

The Basics of Communicating

INTRODUCTION

In this unit we consider the basic principles underpinning all forms of communication, starting with how to use language effectively and, in particular, how to persuade – the purpose of most business communications.

We move on to examine the many non-verbal factors which influence communication, arising from, usually, unconscious aspects of our own perceptions, attitudes and behaviour. You need to be aware of these in order to communicate effectively.

The next sections consider key aspects of the fundamental skills of reading, speaking and listening.

Finally, we examine the skill of note taking – the situations in which the skill may be required (which are more numerous than you may imagine in a business context) and the different approaches which may be adopted.

A.   THE IMPORTANCE OF LANGUAGE

Whatever channel of communication you use – written or oral, face-to-face or via some intermediary – the effectiveness of the message will be largely dependent on the individual words selected to reflect your meaning. Even if you utilise signs or images, the recipient's response will be coded in language.

We have a word-based culture which is used for us to communicate all our feelings, thoughts, attitudes and prejudices; or which can be deliberately manipulated to produce puns, double meanings, poetry or prose. We also have perceptions which we use to help us describe events, people, and scenery. Oracy (or oral communications) is as word-dependent as literacy (written communication).

We use an internal selection process based on our education and experience to choose the right word or phrase for every context in which we find ourselves. Often our vocabulary will change according to that of the person with whom we are communicating. We may adopt mannerisms or accents subconsciously in particular situations. What is certain is that we take words for granted and believe that the meaning we attribute to them is the true meaning, our pronunciation the correct one, and the context in which we use them appropriate. We may fail to notice catchphrases or tags which we use again and again either in oral or written communications, for example:

> *"Uh-huh"*
>
> *"Yeh"*
>
> *"You know"*
>
> *"It's amazing"*
>
> *"Swings and roundabouts"*

Language has a purpose to communicate. This does not mean that it is always straightforward. Careful phrasing and information can change the entire perceived meaning of a phrase or sentence, e.g.:

> *"Do you think we need to use Susan in the production briefings?"*
>
> *"Well, she's very competent ---"*

You can feel the "but" in that response and yet nothing detrimental about Susan has been uttered.

The inappropriate use of foreign languages is deliberate and aims to establish either superiority or a sense of unity, for example:

> *"Pretentious? Moi!"*

To complicate matters further, the recipient of your communication may well have a different set of meanings attached to the words and phrases you use and thus view your message in an altogether different way from the one which you intended.

> *"The relationship between academic theory and marketing practice is a reflection of their relative positions in terms of the key dimensions of differentiation and cost-effectiveness."*

What does this mean? What it does illustrate is a total lack of understanding of its own statement. It is also a combination of different ideas meshed together to form incomprehensible jargon.

Effective Use of Language

> *"Sticks and stones may break my bones*
> *But words will never hurt me"*

Would that this were true! It is not just the words of others which can hurt us, but our own words which can injure our reputation or professional status.

How, then, can we use language that accurately reflects our objectives and is clearly understood by those with whom we communicate? There are a number of ground rules or basic techniques which underpin any effective communication – oral, visual or written.

- Keep the aims of the communication firmly in mind.

- Plan the communication – channel, location, time, person(s).

- Aim for brevity.

- Ensure ideas are clearly expressed.

- Keep to relevant points.

- Avoid unnecessary jargon or technical words.

- Prefer the simple to the complex.

- Check that the communication is logically structured.

- Know what you are communicating about: be adequately briefed.

- Use appropriate tone and style.

- Use appropriate language (i.e. French, English, etc.) that is understood by all parties.

- Be positive.

- Review and assess for errors.

- Don't allow your language to become boring, cliché-ridden, insincere or hypocritical.

- Don't patronise.

- Don't waffle.

- Respect the views and opinions of the recipient.

- Be able to respond to feedback.

- Plan and evaluate the communication

Influencing Factors in the Use of Language

The following factors influence not only your use of language but that of the receiver of your communication:

- Age

- Culture

- Gender

- Race

- Religion

- Status

- Context

- Education

- Technical knowledge/expertise

- Organisational culture

- Previous meetings/experience

Note that the "global village" means that more and more organisations are working with other organisations from all over the world. The development of the EU will mean an increasingly European environment for British organisations. The appropriate use of language becomes more and more apparent.

Errors in product names or slogans as a result of not taking the culture or language into account have abounded. For example:

- "Hoover sucks", which is banned in the US.

- "Sellotape", which is a brand of condom in Australia.

- "Bums" – crisps sold in Spain, which are not available in the UK under this name.

In France it is advisable to avoid "Franglais" – a sensitive political issue! (Le parking, le stopping --)

Persuasive Language

Persuasive communication techniques are essential for an effective manager in the whole range of business activities:

- Presentations

- Internal marketing communications

- External marketing communications

- Meetings, briefings

- Personnel issues

- Negotiations

It is always important always to consider issues or ideas from the other person's point of view (be customer-oriented) and determine what's in it for them before making any representation. In this way communications can be positive not negative, and the communication has the scope to be proactive not reactive.

If you want to persuade, be positive and customer-oriented. Hence:

> *"Sales are up by nearly 50%."*
>
> **NOT:** *"We've only managed to sell 20 so far!"*
>
> *"This is going to be a really wonderful family event with lots of attractions."*
>
> **NOT:** *"There's going to be lots of screaming children and overpriced fairground rides."*

The purpose of persuasive communication is to harness and utilise skills which seek to convince, motivate, exhort and influence for a particular purpose and in a specific context. It may be used to lead decision-making, support management objectives, advertise, sell, lobby or promote.

Often the persuader will use more emotive vocabulary, short sentences and accentuate the positive. He or she may feel it necessary to be less formal and more familiar in the use of particular words or phrases.

The persuasion may take the form of offering alternatives which have obvious disadvantages for the recipient which the original proposal does not share.

The skilled persuader will also be aware of how best to present the outcome of the communication to his or her own organisation.

Advertisers are the most obvious example of professional persuaders. Yet the product, service, idea or proposal must have genuine merit as perceived by the recipient of the message, or he or she won't be persuaded otherwise.

In the majority of business communications persuasion is used as an effective negotiation skill.

Careful phrasing of correspondence, whether it is formal or informal, will reflect your meaning accurately and be appropriate to the context.

Persuasive language has a place even in briefs or reports, as it is a way of phrasing which accentuates the positive without resorting to slang or inappropriate language.

The following examples show how persuasive language elicits favourable or positive responses:

(a)   *"As a result we are **highly effective** in building new business **opportunities**."*

(b)   Compare the following:

      (i)   *"The CBI Quarterly Industrial Trends Survey for smaller business reveals a **strong increase** in orders and output in the four months at rates faster than expected."*

      (ii)   *"There was a **significant** increase in orders and output in the four months."*

(c)   *"It's packed with **leading edge** Pentium technology, at very **down to earth prices**."*

(d)   *"Help **you** plan and install completely **integrated presentation** systems in **your training room or board room**."*

(e)   *"Will become the **leader** in its market in terms of its **unmatched product offering** and its **unrivalled service to customers**."*

(f)   *"Give **your** brand the **crucial edge** which will make it **stand out** from the crowd."*

(g)   *"The purpose of this report is to illustrate how X can **shape** the **future** for training provision."*

B.   NON-VERBAL COMMUNICATION AND SELF-PRESENTATION

The way we perceive others and they us is often a result of a series of assumptions which we make as to their status, attitude and potential response to us and our communication.

Remember we are all three people:

(a)   The person we are.

(b)   The person we think we are/would like to be.

(c)   The person that other people perceive.

How we present ourselves may not be a reflection of how we perceive ourselves or would like to be perceived. Certain aspects may predetermine others' perception of us:

● Job title

● Status

● Gender

● Age

● Background

● Use of language

● Appearance

● Accent

● Stance/attitude

● Gesticulation

How others choose to respond to the **non-verbal signals** that we send will be a combination of:

● Their prejudices, perceptions and attitudes.

● How we choose to present ourselves.

● Our understanding of the communication process.

Stereotypes

Stereotypes may be damning and unrepresentative but are useful hooks on which to hang our impressions (correct or otherwise). These stereotypes may be influenced by media presentation of types of individuals or groups, or based on our own experiences and relationships. Categorising people by job title or status is one of the easiest ways of imposing a stereotypical view.

Hence doctors or teachers will be perceived as reflections of our own prejudices and relationships with doctors or teachers we know and have known. If introduced to someone by job title, your instant response is to sort this information internally and decide what the implications are of that information. As you converse with or observe that same individual, you will either reaffirm or adjust your perceptions accordingly.

Just to illustrate how persuasive these types are, complete the following Table (Table 2.1) by filling in the gaps.

Table 2.1: Considering stereotypes

Job Title	Gender	Age	Type of Car	Type of Housing
Primary school teacher		28		
Lawyer	Male			
			E-type Jaguar	Town house
Nurse		42		
Dentist				

There is no correct answer, but the answers you give will be a reflection of your own thoughts, attitudes and perceptions of these job categories or titles.

Remember that a lot of prejudices need to be challenged and that our collection of assumptions will not represent any individual. Effective communication cannot be if it is pervaded with entrenched outmoded or unnecessary assumptions about people. We need to ask ourselves continually:

Exactly who are we communicating with?

Anecdotal evidence abounds of salespeople only attempting to sell household goods to women, and building services to men. Why? This may be correct in some instances, but if they **listened to** and really attempted to communicate with their customers, they could find out who is making the purchase decision and sell to, rather than offend, them.

Our Self-image

Our self-image is influenced greatly by the way we think others see us, and sometimes we may deliberately attempt to create an image which we think others will find more acceptable.

Maybe we overestimate or underestimate ourselves or simply misread people's reactions towards us because of a lack or surfeit of confidence or our own prejudices.

What self-presentation does is convey our personal qualities, not our expertise or knowledge.

Try completing the exercise in Figure 2.1. First fill in the boxes in the "How I see Myself" section, as honestly as you can, to show what most accurately reflects your self-image. Then, complete the second section indicating what you think others think of you. If you are really brave, you could ask someone who knows you well to complete this section to get a more objective view!

What this exercise should do is point out any differences between your self-image – what you feel you project – and how others see you. It may be that "you" are different with different people and in different contexts – at work, at home, with friends.

How do I see myself?

Friendly	☐	Unfriendly	☐
Happy	☐	Miserable	☐
Outgoing	☐	Shy	☐
Even-tempered	☐	Quick-tempered	☐
Honest	☐	Arrogant	☐
Intelligent	☐	Unintelligent	☐
Professional	☐	Good sense of humour	☐
Tolerant	☐	Nervous	☐

How do others see me??

Friendly	☐	Unfriendly	☐
Happy	☐	Miserable	☐
Outgoing	☐	Shy	☐
Even-tempered	☐	Quick-tempered	☐
Honest	☐	Arrogant	☐
Intelligent	☐	Unintelligent	☐
Professional	☐	Good sense of humour	☐
Tolerant	☐	Nervous	☐

Figure 2.1: Self image

Other Non-verbal Communication Factors

In addition to status assumptions, other influencing factors in the communications process which are non-verbal will be:

(a) Body language:

- Facial expression

- Eye contact

- Posture and stance

- Physical contact

- Gestures and gesticulation

(b) Appearance:

- Style

- Appropriateness of clothing to situation

- Attention to appearance

(c) Reading skills:

- Ability to understand text/information

- Being able to read the gaps

Body Language

(a) Facial Expressions

Whilst generally accepting that a smile is a gesture of warmth and friendliness, psychologists at Dartmouth College have discovered that many of us mistake phoney smiles for the real thing. We probably don't notice the difference because we don't want to and accept phoney smiles as genuine. We feel better about ourselves if we think people like us.

The subtlety of facial expressions is determined by the type of eye contact we encounter. It is important to look people straight in the eye when talking to them. Looking upwards, downwards or to the side indicates that they are not worthy of our full attention and therefore lack significance. Establishing eye contact creates a bond between participants. If you feel unable to do this, by focusing between the eyebrows of the person you are addressing it will appear that you are looking directly at them without your feeling committed to an undesirable contact.

Staring at people or being stared at is very discomforting. Indeed, if you stare at a part of a person's face, he or she will become acutely aware of this and scratch or touch the place concerned.

Trying to "read" people's facial expressions is an important aspect of communicating with them, as it will give clues as to their responses to your oral or written proposals. (See Figure 2.2.)

(surprise)   (sadness)   (fear)

(anger)   (happiness)
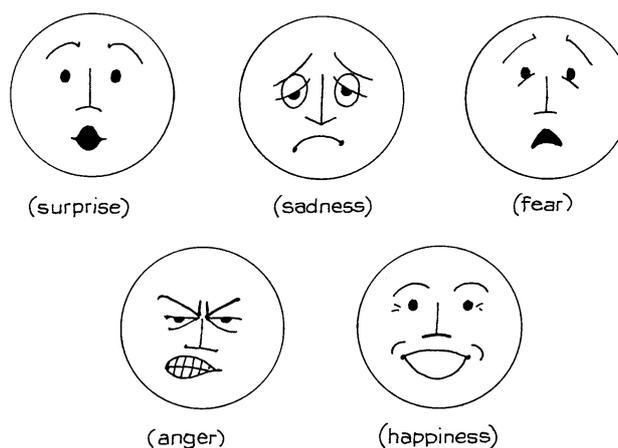
"Eventually, the Chairman found much in the
report to meet with his approval!"

Figure 2.2

Winking or twitching, scratching, sniffing or snorting are all characteristics which are
unattractive and draw attention to the individual concerned, not the purpose of the
communication.

(b)   Posture and Stance

In business situations you will probably stand or sit, enter or leave a room. How you do so will
form an immediate impression.

Standing attentively is actually easier to achieve than sitting attentively yet comfortably.

Slouching, leaning forward, and arms crossed all give impressions of our attitude, not our
physical comfort.

Consider the attitudes that the following postures indicate:

●   *Leaning forward on desk*

    This can indicate attentiveness or be representative of overfamiliarity/dominance of the
    other person's personal space.

●   *Perching on edge of seat*

    This is usually perceived as nervousness, being ill at ease with the situation or individual.

●   *Fiddling with pens/paper, etc.*

    This indicates either boredom or nervousness; either way it shows a lack of commitment
    to the meeting, a feeling that your "mind is elsewhere".

●   *Arms folded tightly across chest*

    This is a classic defensive position. Arms crossed lightly can be a useful position for
    those who don't know what to do with their hands.

●   *Reclining in seat*

    Possibly a little too relaxed!

- ● *Biting nails, scratching*

  Not only does this indicate nervousness or boredom but the habit becomes the focus of the meeting rather than the information. The other person will find this extremely irritating and may not view any proposals made with favour.

(c)   Physical Contact

Physical contact is much more than a firm handshake, or even a firm handshake accompanied by looking directly into the eyes of the person with whom you are communicating. It is about personal space and how sensitive you are to the spatial requirements of others. Touching is rarely appropriate in the business context and compulsive touchers may be viewed as overfamiliar or rude and overbearing.

(d)   Gestures and Gesticulation

Shaking or nodding your head indicates disagreement or collaboration; a thumbs-up sign in a meeting may not be appropriate!

Scratching the nose may be viewed as being thoughtful, as will resting the hand under the chin.

The problem with gestures and gesticulation is one of recognising those gestures we use all the time which may not be viewed favourably by others. Excessive gesticulation (hand movements) is very disconcerting and becomes the focus of the communication.

Appearance

It is sad but true that we judge and are judged by appearance. The first impression is as critical to the success of business communication as the contents of the meeting, brief or presentation.

Clothes do not make the man (or woman) but they do help others to make an initial assessment of him (or her).

We can summarise the impact of appearance as follows:

(a)   Personal style –   how we choose clothes that reflect our personality and suit our physical shape/type

(b)   Appropriateness –   wearing appropriate clothes dependent on the context or situation. On management weekends it's often hard for delegates to strike the right balance between formal and informal clothing.

(c)   Attention to appearance – this includes whether clothes are clean, ironed, fit, or have buttons missing; whether shoes are scuffed, colours match and don't clash; also use of colour.

Application

By developing an understanding of how non-verbal characteristics may influence the effectiveness of the communications process, you can place much more emphasis on what you actually intend to communicate. You will be enabled to:

- ● Plan your meetings.

- ● Be ready with alternative approaches to the situation.

- ● Use the location to your advantage (possibly by choosing one with which you are familiar or by arriving early to check entrances, seating plans, etc.).

● Discourage interruptions which will influence the non-verbal impression you give, e.g. telephone calls, visits.

● Sit or stand comfortably and in your own personal space.

● Appear relaxed, interested and committed to the exchange.

● Avoid overfamiliarity in words, language or gestures.

● Check your appearance.

● Retain eye contact at all times.

● Talk clearly, avoiding jargon or gabbling.

● Listen.

C.   EFFECTIVE READING

The ability to grasp the salient points of a text is an increasingly important non-verbal communication skill. Not only do you need to recognise and interpret bias, but you must also select information which is of use to you and your organisation. Scanning or skimming texts is a technique best acquired with practice, but by recognising key words and phrases the importance of the text in a newspaper, magazine or journal can be restricted to one relevant article instead of laboriously poring over each page. Look out for the gaps in the text. What information is missing? Why is this the case? What organisations choose not to let you know is as fascinating as what they reveal.

Remember that most sources of printed literature represent carefully phrased and structured accounts of ideas, events or issues. Use written texts to your advantage.

There are certain techniques which you can use to develop the effectiveness of your reading, and we consider these here in respect of selecting the right reading materials and reading efficiently and effectively

Identifying the Right Material

You clearly need to determine if a publication is going to provide the right information for your task, but it would be surprising if this were the only criterion you identified. Particularly if you have a choice, a number of other criteria come into play. The sorts of things we would consider include:

● is the topic you are interested in precisely covered by the publication – i.e. does it provide the right information?

● does it cover the topic at an appropriate level – is it too basic, in which case, you will not get what you are looking for, or is it too complex or detailed, in which case you will not find it easy to pick out what you want (and probably won't read it!)?

● is the publication arranged in a way which makes it easy to find what you need?

● is the style of writing such that you would want to read it?

You may fell there are other criteria. We have assumed, for instance, that the publications are accessible in the way in which you want to use them (for example, you can take them away to study). We have also discounted how big the book is – there is always a tendency to favour something that looks as if it contains the right information in a smaller form, but well-organised large publications can be just as easy to use.

The above list, though, contains the main criteria, and also in their order of importance. But how do you check quickly that the publication does in fact meet them? There are a number of ways.

● *Read the introductory information about the book*

There is a wealth of information about the content of a publication contained in its title, publication details, introduction and contents, etc. For example, the precise wording of the title and background information about the author can indicate a particular slant on the subject, the publication details will tell you when it was written and you can draw conclusions about how up-to-date it is from this, the back cover and introduction may state its target audience and application (especially in the case of text books), and the contents page(s) will give you a better idea of what is covered and how.

● *Have a look at any conclusions or summaries*

Especially in reports, but in many textbooks now, summaries are provided to assist readers in getting an overview of the subject matter.

● *Read a few pages*

This can give an indication of whether the publication deals with the subject matter in a way which you can get on with and can easily extract the information you need. The writer's style is important – whilst your reaction is a very personal thing, you need to feel comfortable with reading your source material, if at all possible.

Checking the suitability of source material in this way allows you to concentrate your time on studying relevant information. However, one last point to state is that most publications, even reports and work files, usually contain references to other works – these can provide you with additional sources should you need them, and even books you discard as not meeting your criteria may be useful in this respect. So check bibliographies or other references to further reading.

You can try these approaches the next time you visit a library, or even a bookshop.

Efficient and Effective Reading

Time is the ever present enemy to reading. Once you have identified the publication(s) which contain information you need in the form that you want it, you need to use your reading time as efficiently as possible. There are a number of approaches to this.

● **Be selective** – you may not have to read the whole publication, or at least not in the order it is written. Use the contents listing and index to select the most relevant sections on which to concentrate.

● **Skim the text first** – get an idea of the general content of particular sections by flicking through it looking at sub-headings, figures, the first few words of paragraphs, etc. You can get a good idea of what is in it from this, as a basis either for determining relevance or for detailed study.

● **Concentrate on reading** – this may seem obvious, but it is surprising how often our concentration wanders, particularly when tackling difficult subject matter. One technique which can help is to use a pen or pencil to track down the page while you are reading (not marking it, of course!) – this tends to keep you focused on the text.

● **Make notes** – very few people can remember everything they read in enough detail for it to be helpful, and it is easier to refer to notes, rather than the publication itself, when you start to use the information. Also, unless you have an unlimited budget and can buy every book you think

may be useful, it is likely that you will need to return books to a library and will not still have them to refer to. (Note taking is covered in more detail below.)

People have all sorts of different approaches to reading – from very wide ranging and exhaustive to highly selective and specific to a particular topic. Both, and all stages in between, are equally valid. If it works for you – use it. Do not be put off by the approaches suggested by other people if you are happy with your own.

D. VERBAL SKILLS

Face-to-face communication is not wholly dependent on non-verbal skills. How we express ourselves verbally and respond to the language of others is fundamental.

Verbal communication is not just about which words we choose, but also encompasses the following factors:

- Pronunciation

- Accent

- Clarity of speech and expression of ideas

- Choice of language (specific words)

- Use of foreign words

- Jargon or technical words and phrases

- Stress

- Tone

- Volume (are you audible to your listener(s)?)

- Rhythm and pace

- Articulation

These factors are important whether we are communicating with one person or a group of people – and, indeed, some may be equally applicable in written communication.

We speak to make ourselves understood: to convey our thoughts, ideas and proposals. Verbal communication is an activity where we can form an actual and immediate relationship with those with whom we communicate in a way that written communication cannot.

However good our overheads or preparation and our understanding of non-verbal communication, if we lack confidence or are unable to articulate our thoughts the communication will fail. This immediate and personal relationship with our audience is the arena where much business takes place. Networking is, after all, based on verbal communication. There is, however, little point in identifying the right people to network with if you are unable to communicate with them.

(a)   Pronunciation

- Regional dialects are only relevant if you are going to use pronunciations or specific words which only those from a particular region will understand; otherwise you may risk alienating your audience.

- Strangulated vowels or pronunciation is irritating.

- The word "bath" is perfectly acceptable as either "barth" or "baath" or "bath", but "barf" or barrth" sound contrived. Try saying these aloud and you'll see what I mean.

- An affected accent is insincere.

- Take care to speak slowly if your audience do not have the same accent as yourself.

(b)   Clarity

If you plan what you have to say and understand both the points you intend to make and the potential objections to them, then you ought to be able to express your ideas and proposals clearly and simply.

Your ideas should follow a logical sequence and allow the listener the opportunity to consider each point in turn. A circular or apparently random argument can quickly deteriorate into arguing over minor issues, because no one is quite sure what the major issues are.

(c)   Choice of Language

Sometimes slang words are permissible in oral communication in a way that they will not be in written text.

"OK" or tags like *"Fine", "Very good"* can be used in response to questions. Swearing is usually inappropriate.

Avoid over-complex phrases or jargon. Technical words are best used in relevant contexts or learned journals, not to parade your knowledge and others' lack of knowledge. The purpose of the exchange is to communicate, not self-aggrandisement.

(d)   Stress

You may choose to stress important words or syllables, much as you may highlight or underline written text.

Stress may change the meaning of an entire sentence. For example:

We **may** need to improve sales by 10%.

We may need to **improve** sales by 10%.

We may **need** to improve sales by 10%.

In speech you may choose to phrase a sentence differently than you would in text to achieve different emphasis.

For example:

"I think we might have to improve sales by 10%."

"Unless we can achieve a 10% improvement in sales -----"

"Based on last year's figures an increase of 10% looks likely."

"A 10% improvement in sales is what we're aiming for, for the period -----."

(e)   Tone

The tone of your voice indicates your emotional response and enthusiasm for what you are saying. Consider the following sentence and say it to yourself as if you are amazed, curious, angry, disapproving or sympathetic. The words don't change but your tone and the stress you place on particular words will.

"When did you get back?"

(f)   Volume

Make sure that people can hear you, but don't shout or heckle them. The volume of a person's voice usually depends on the distance between speaker and listener and the nature of what he/she is saying.

(g)   Rhythm and Pace

There is no need to rush any oral presentation. Plan what you have to say for the time allocated and adopt a pace which allows you to achieve this. Similarly, lengthy pauses between points or phrases are extremely irritating.

(h)   Articulation

Failure to speak clearly results in ambiguity and misunderstanding. Avoid:

- Mumbling

- Hesitancy

- Reading every word like a "robot"

- Missing off the beginning or ends of words

E.   LISTENING

Managers spend approximately 60% to 70% of their time communicating with individuals or groups, and of that time, approximately 55% to 65% is spent listening. Improving listening may result in better relationships and better understanding of those with whom we communicate; provide information; stimulate new ideas; and motivate others to improve their listening skills.

Conversely, not listening can result in many misunderstandings, particularly if a message has then to be conveyed to others. Individuals may miss appointments, fail to grasp the salient facts of a communication, or fail to hear the name of the person they are speaking to. In an emergency, not listening could prove fatal in a business communication. Particularly in a customer-oriented environment, not listening to internal or external individuals, groups or markets could prove fatal to the development or existence of that business.

Active Listening

Listening is an active, not a passive, activity. It requires understanding of the communication and the ability to make effective judgements on what is heard. Many breakdowns in communication take place because people don't listen attentively to what is actually said, but to what they would:

(a)   Like to hear; or

(b)   Expect to hear.

Active listening is characterised by positive body language and an attentive pose. It may be necessary to summarise what has been said at key moments to ensure that both parties have understood the communication.

There are three levels of listening:

- **Attentive listening**, for important or highly relevant information.

- **Empathetic listening**, to attune oneself with the speaker and to seek common ground in appreciation of his or her attitudes, feelings and emotions.

● **Casual listening** for pleasure, where we may respond in a more light-hearted way and use puns and double meanings as a means to enjoy the actual language used.

Effective Listening

Most of us do not listen effectively for a variety of reasons.

● We comprehend faster than we speak.

● External distractions compete for our attention.

● We don't take the time to listen.

● We don't know how to listen.

● We allow our own emotions and prejudices to filter what we hear.

Effective listening can be achieved if we:

(a) Listen for facts and remember key words.

(b) Listen for feelings, interpret the speaker's point of view, observe his or her non-verbal communication, and listen to what **isn't** said.

(c) Do not tune out to unpleasant messages that we are not keen to hear.

(d) Clarify what is being said by asking questions where relevant.

(e) Give a reflective summary (if it is appropriate), which briefly paraphrases what the other person has been saying; you then know that you are both on common ground.

Informal as well as formal channels of communication will utilise oral or spoken communications to convey all sorts of information. Oral communication may not merely be on the level of a conversation between individuals but could be in the form of a video, a filmed presentation or video conferencing. Oral communication is often the most widely used form of communication, but lacks the stature of written or technological forms because it appears to be less formal and less tightly organised.

To be effective within your organisation, you need to make use of and understand all forms of communication. Effective listening is a vital ingredient in sharing and acquiring important business information.

F.   EFFECTIVE NOTE TAKING

Note taking is a way of formalising all the ideas and research which you carry out at all times in order to be well informed and to function efficiently at work. Note taking encompasses apparently casual conversations, business meetings, television or radio programmes, trade journals, newspapers, magazines, advertising, ideas or responses to window displays, fine art, design, architecture or views.

Over time, note taking is an analytical skill which provides you with back-up data and ongoing relevant market research. It also helps you to keep an open mind to new influences and to connect ideas and events with projects or proposals with which you are involved.

The Purpose of Note Taking

The main reason for note taking is often assumed to be to provide a written record of a spoken presentation or event which can be referred to at a later date to aid recall. Whilst this is undoubtedly

true, it rather misses a key point about note taking – that the way in which you interpret and record information in taking notes can, in itself, be an invaluable aid to learning.

When you make notes, from whatever source, you are necessarily sifting, summarising and shortening the full information. This is a key aspect of any research. You are selective about what you record, so you pick out the key points, and then write them down in your own words. "Your own words" might be the same as the way the information was expressed by the source, but are very often different to reflect your own individual way of understanding it.

Thus, note taking serves two purposes:

- to aid learning; and

- to facilitate recall and/or retrieval of the information.

Note Taking and Sources of Information

It is easy to see the value of note taking in terms of enabling recall or retrieval of information, in relation to lectures, seminars and discussions, or books and other documents which have to be returned to a library or file. However, because of the role of note taking in aiding learning, it should not just be confined to these sources of information. It has a value in relation to any source of information, even books or documents which you can keep to refer to.

You should then, make notes from any source where you are trying to acquire information.

That said, there are slightly different issues in respect of different sources – written and oral ones – and in respect of whether you take notes at the time or afterwards.

- **Taking notes from written sources**

    The key to effective note taking from a book or other document is to read it in short sections and then pick out the key points to record. It is often the case that paragraphs only contain one real point and the rest is padding – or as authors would say, exemplification and amplification! You need to identify the key point that is buried in there somewhere and record that.

    (Reading and making notes in this way also helps to break up material into manageable "chunks" – aiding both concentration and the following of difficult arguments or discussions.)

    You may also want to pick out certain phrases or sentences that the author uses as being particularly significant or apt. These should be recorded as quotes so that, if you use them at a later point, you can attribute them appropriately to the author.

    Acknowledging sources of information is often important and it is useful to keep a record of the sources you consult at the time, possibly on cards which have publication details and perhaps very brief notes about the content, so that you can build up a file of references.

- **Making notes from oral sources**

    Taking notes from what people say and do – in lectures, discussion groups, interviews, observations, etc. – has to be a much more instantaneous thing. You do not have the luxury of being able to pause to consider what has been said before deciding what are the key points to record – by the time you've done that, you will have missed the next point. You need to be able to get the information down as it is presented.

    This means you have to try to pick out key points as things are going on. You need to concentrate, and be able to write quickly.

    Many situations – for example, training sessions, meetings and some lectures and interviews – are structured around a prepared programme or agenda which can be used as the basis of your

notes. At times, particular visual displays may be used by a presenter to make or record points – handouts, overhead projector slides, flip charts, etc. These can also be used to help in your recording of the event.

Just as it is important to keep a record of your written sources, so it is with oral sources. You should always note the date and overall subject, as well as perhaps the time and other participants where these may be significant for future recall.

It is not always easy to make effective notes in discussion groups, workshops and interviews, etc. where you are a participant. You have to find the time to make your notes as well as be involved as a speaker. The way in which discussion can flow within such interactions also means that key points can be difficult to identify, or keep changing. A good group leader or chairperson will attempt to structure the flow to keep discussion focused and ordered.

- **Making notes after the event**

  It is always better to take notes at the time of the experience – the reading, meeting, interview, etc. However, there are often situations which make this difficult, if not impossible. Examples include casual encounters which result in acquiring information unexpectedly, some types of interview, working in different locations, etc.

  In such situations it is important to make notes as soon after the event as possible, so that everything is still fresh in your mind. It is surprising how much we forget in a short space of time.

  Records of an event are often formally produced in the form of reports and minutes. This doesn't necessarily mean that you don't have to take your own notes. You may want to check the official record against yours, or at least perhaps keep your notes together with it.

  Lecturers and trainers also often produce records of an event in the form of copies of their own structure notes and visual displays. These can help to develop or complement your own notes, or even be used and annotated with your own thoughts and interpretations.

Note Taking Techniques

Everyone has their own individual styles of note taking. Some people take a lot, others very few. Some prefer to make notes after the event, although most elect to make notes during it (often for the simple reason that they know they'll never get around to it if it's left until later!).

There is no right or wrong way. Whatever suits you, and achieves its purpose in terms of assisting learning and facilitating retrieval, should be fine.

There are a number of general principles behind note taking, and some specific techniques which you can use.

(a)   General principles

  We can identify four general points about note taking which apply irrespective of the source of information, the nature of the research, or the technique you use.

  - The fundamental principle is to be selective. Don't try to write everything down, but pick out the key points, words and phrases.

  - Translate into your own words as much as possible. This involves reflection and conceptualisation and, thus, helps understanding and learning.

  - Use abbreviations – common ones or your own system. As long as you can understand them later, it doesn't really matter how obscure they might be to someone else.

● Structure your note taking around the key points in a way which brings out the connections between all the different points. A number of different methods of doing this are considered below, but they all involve identifying and highlighting the most significant issues and linking subsidiary points to them.

In this connection, use of different colours or highlighter pens can be useful, although chopping and changing between pens can sometimes be distracting and time-consuming.

(b)   Linear notes

This is perhaps the most common technique for note taking, mainly because it mirrors the way in which information is usually presented, but also often because no other techniques are known.

Linear notes consist of headings and sub-headings, often numbered, with subsidiary information below them, written in a linear fashion down the page. Particular points may be linked by arrows or brackets, underlining may be used for emphasis, and the structure or organisation of the notes may be shown by rough indentation in places.

An example is given in Figure 2.3.

Innovation
Are innovation and change the same thing?

Change: *Can be slight*
                  adaptation minimal
               ——————⟶   *transformation at other end*
**   *moving from one state to another*

Innovation: novelties / changes
                      originality / creativity

Related concepts and associations:
1. Progress: *moving forward,*
                      more positive
                      future
          (evolution, achievement)

2. Creativity: *imagination, inventiveness*
                      discovery
     strong link   ——⟶   *inspiration, intuition*

3. Development: *increase, augment*
                          advance / extend, etc.

Figure 2.3: An example of linear notes

(c)   Spider diagrams

This approach shows connections in a different way – graphically. The best way of explaining it is to illustrate it, as in Figure 2.4.

As you will see, the most important point is identified and everything else is linked to this by means of branches and sub-branches. The technique forces you to be concise and identify points in one word or very short phrases at the most.

Spider diagrams are particularly well suited to recording unstructured interviews or discussions where there is no clear linear framework to the interaction.

As the example shows, boundaries can be drawn around particular sections of the "web" in order to highlight groupings. This can be done at the time or after the event, as the notes are reviewed. The technique can actually be usefully applied to linear notes after the event in terms of reorganising and reinterpreting them, and then expressing them in a more graphic form.

If you now look at the diagram in detail, you will see that it provides a breakdown of the advantages, uses and key methods of patterned notes.
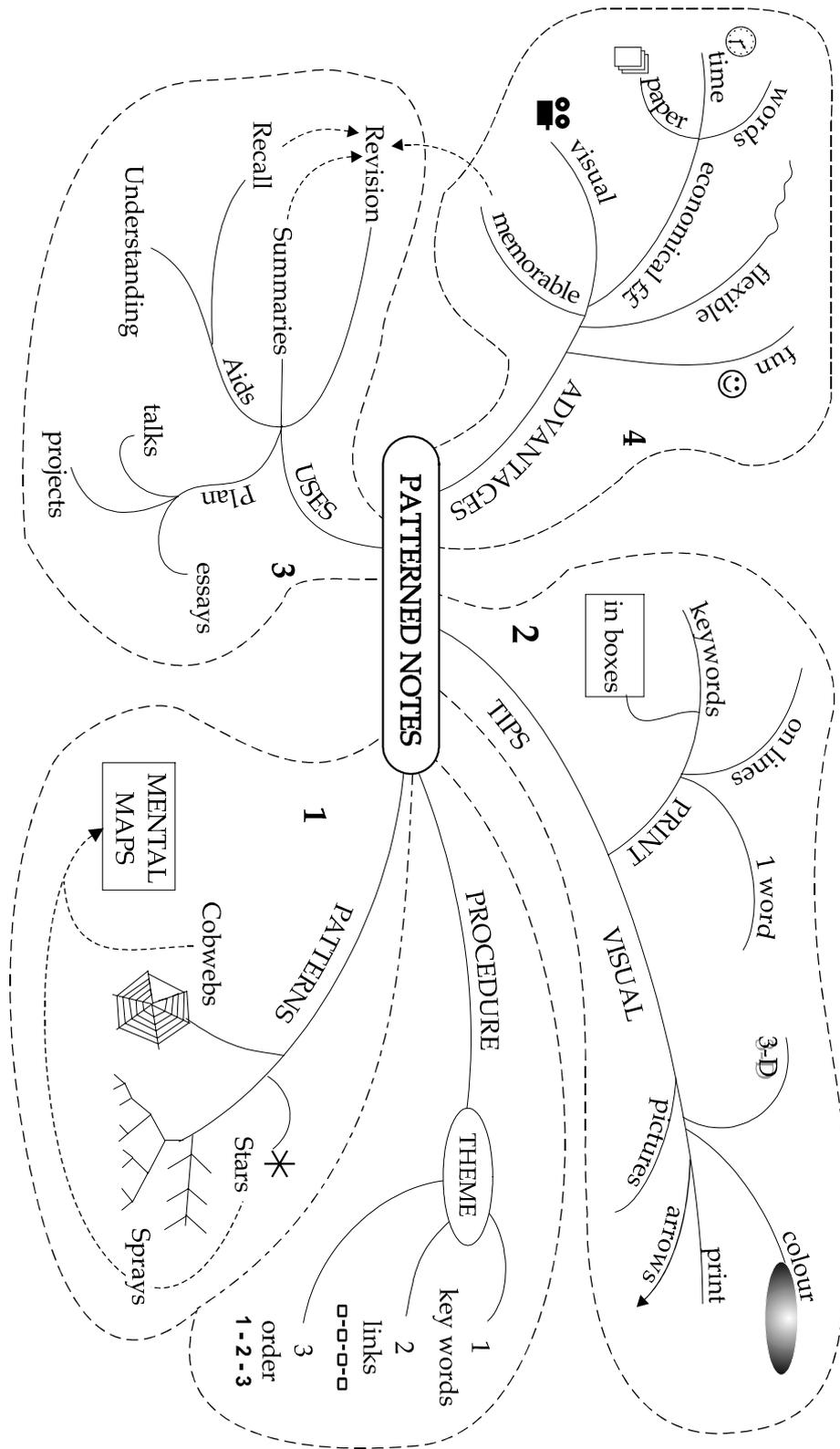
Figure 2.4: An example of a spider diagram

Common Problems with Note Taking

Everyone has problems from time to time with making effective notes. Once you are reasonably practised in the art, most of these problems come less from your own inadequacies and more from the inadequacies of the presentation of the information in, or by, the source.

We can identify certain things about the form of presentation which either facilitate or hinder the making of notes. These factors can be divided into four categories, as follows:

- the structure of the presentation – the clarity with which the information is organised and presented, particularly with regard to introductory explanations;

- the tone and approach of the speaker – the extent to which this engages you as a listener and draws you into the topic, or conversely, distances and excludes you;

- the variety of format within the presentation – the use of different presentational effects, such as graphics, which help to put the information over; and

- your own interest in the topic under consideration (which may or may not be helped by the three former points).

Of these, the most significant barrier to effective note taking is the first – if the structure is poor, it requires you to work harder to establish a structure for your notes. The other points are mainly to do with the motivation of you the listener!

It is useful to be aware of these points, not only to appreciate a good presentation when you experience one, but also to assist you when you need to present information – in either written or oral form.

Study Unit 3

Written Communication

INTRODUCTION

In this study unit we are going to look at the importance of written communication, its purpose and the forms it can take.

We start by discussing how to approach business correspondence in general – concentrating on letters, memos and briefs, as these are the basic forms of communication in the business context – and the particular requirements of matters such as letters of recommendation and complaints.

We then go on to look at report writing, beginning by considering the reporting system in general and the various types of business report, including appropriate formats. This is followed by a consideration of several types of reports, before considering the different skills required to write articles.

Finally, we consider how to place and construct communications for public relations and direct marketing purposes using press releases and mailshots.

A. THE WRITTEN WORD

Written Compared with Oral Communication

Written correspondence within or between organisations may take many forms. The crucial difference between oral and written communications will be the importance attributed to each. Oral communication will be the basis for almost all negotiations, liaison, team briefings and project management, but written communication will be viewed as an endorsement of oral statements, as having a permanence and contractual status. Written communication can be used as evidence of previous discussions and arrangements. It provides the history of a project or collaboration. It justifies an activity and provides back-up and proof.

We attach an enormously high value to written text. Once written down, words are themselves pinned down, selected, representative, deliberate, permanent and important in their own right in a way that effective oral communication can never be.

If we consider graffiti, for example, it has a real permanence that a joke or throw-away comment could never have. Words are tangible, independent of their authors. We pay more attention to even poorly expressed words in textual form than we would ever give if they were spoken to us. The act of writing renders words "true". It is no wonder that copyright law and libel are major issues of our time.

Written text makes information immediately available to an almost unlimited audience simply by dint of reproduction. Photocopying or printing processes can bring news media into our homes every day which can be referred to again and again.

Whereas oral communication needs to be succinct and clear of purpose, written communication has the scope to elaborate, to justify and to manipulate information deliberately into particular phrases so that many versions are available. When we write to confirm arrangements, we have an opportunity to rephrase and reinterpret meetings or oral communications in a way which we feel is most suitable. There is a distance between the act of speaking and the act of writing.

Similarly, in responding to oral communications we have been influenced by body language, tone and appearance of the speaker, and may not remember all the words spoken but gain an overall impression of the success of the communication and have noted the key points. A written communication is

bereft of those interpersonal skills and allows us to judge and interpret the actual words in order to make a considered response.

Purpose of Written Communications

We use written communications most frequently to:

- Summarise key issues.

- Invite a response.

- Respond to other written/oral communications.

- Establish a formal basis for the communication.

- Record the process of the communication.

- Provide a source of historical data.

- Express corporate strategy and ideology.

- Lend credibility to our utterances.

- Indicate our intent that the communication be viewed as relevant/important.

- Access a wider audience.

- Ensure the accuracy of the message to all parties concerned.

- Share goals, visions, understanding.

- Present information/data independently of interpersonal skills.

Forms of Written Communication

There is a whole range of formats where information is written down:

- Memoranda

- Letters

- Notes

- Magazine and newspaper articles

- Instructions

- Labelling

- Databases

- Books

- Directories (including telephone directories)

- Pamphlets

- Wills and legal documents

- Company literature

- Postcards

- Signs

- Briefs

- Reports

- Business plans

There is a notion of "inter-textuality" where behind every text is another text, and that there is no such thing as an original word or article or idea as everything has already been phrased in some way before.

Certainly every time you write a report, letter, make notes or send a memo, you will have made reference to previous written correspondence.

For the purpose of written communications within the business context, the forms that you need to make best use of are:

(a)   Letters;

(b)   Memoranda (plus notes);

(c)   Briefs; and

(d)   Reports.

As letters, memos and briefs are the most frequent form of written correspondence/communication within or between organisations, we shall start by examining these formats.

B.   GENERAL APPROACH TO BUSINESS CORRESPONDENCE

In the next two sections we will concentrate on the design, implementation and evaluation of business correspondence. Or, more simply:

- What information should be included?

- How should it be presented most effectively?

- What is the purpose of the communication?

- Who else needs access to it?

- When should it be sent?

- How should it be sent?

- What type of response do we expect?

- What is the most appropriate format?

Letters – First Impressions

A letter is much more than the text it contains. It is a physical document and will be judged by the recipient as such.

It is worth first considering the actuality or physicality of a letter. What is it? Usually, sheets of paper presented within a paper or card envelope. Note the following, however:

(a)   Paper Quality

The weight, colour and texture of the paper used will make a statement about the person or organisation who sent the letter and how they view the recipient. For example, poor quality, dirty or even coloured paper will reflect a lack of interest in, or commitment to, the correspondence. Is it folded to fit the envelope or does it appear to be shoved in?

(b) Envelope

- Does the envelope match the letter?

- Does it have a window?

- Was it franked or stamped?

- Is the sender's address printed on the back of the envelope?

Bills and invoices are more likely to arrive in envelopes with the sender's address on the reverse.

A brown window envelope always used to signify a tax demand; white window envelopes indicate a seriousness of purpose, although this effect will be lost if the address is not displayed accurately because the letter has been incorrectly folded.

(c) Logos and Corporate Image

Is the company logo represented on the letter and envelope?

(d) Typeface

Is the typeface easy to read?

Is the letter hand-written?

Is the signature hand-written?

(e) General Impressions

- Does the letter appear to be one of thousands?

- Is it correctly addressed?

- Are names and places spelt correctly?

- What is the postmark?

- Was the letter sent first- or second-class?

- Is the envelope addressed in the appropriate language for the recipient?

Purpose of Letters

In what circumstances are letters most used as a form of business correspondence? I would suggest that they are used for:

- External communications

- Introductions/prospecting to new clients or potential clients

- Describing the purpose of other enclosures within the correspondence such as product launches, dinner/function invitations, relevant media articles, questionnaires

- Responding to complaints

- Summarising key or salient points made at a previous meeting

- Arranging future meetings, perhaps including possible agendas

- Updating or mini progress reports

- Job applications

Format of Letters

Many organisations are introducing a standard template which determines the spacing and layout of all letters. With the increase in more complicated and varied stationery and logos, it is important that text can actually be reproduced on the page.

Moreover, letterheads should legibly display the following details in order to meet the requirements of the **Companies Act 1985** and the **European Communities Act 1972**:

● The company's status as a limited company (if appropriate)

● A list of its directors if founded after 23 November 1916

● The company's trading name

● The registered office address, number and location of registration

An example is shown in Figure 3.1

There are no rules about letter layout except to state that layout should be consistent, legible and within the frame of the letter spacing. Even historical ideas about positioning the address have changed – there are many variations nowadays.

Envelope layout is more straightforward. If you are using FREEPOST or prepaid envelopes, the Post Office have strict guidelines as to presentation, and need to approve your envelope design.

It is worth noting here that FREEPOST operates on a licence basis, where you open a FREEPOST account having received authorisation/licence on payment of a small fee and envelope design approval. Thereafter you pay for FREEPOST envelopes made use of, **not** for every FREEPOST envelope you have printed. The Post Office will deduct the correct sums from your account (either first or second class) and instruct you to keep a reserve sum to cover the costs of these transactions.

The Post Office Guide indicates Post Office Preferred envelope sizes and address layout. Clearly they will advice you to use the relevant postcode to aid speedy delivery of your correspondence.

ABC BUSINESS TRAINING

62 George Street, London SW21 4DX
Tel: 0208 666 5565   Fax: 0208 555 6656
e-mail: ABC@dotcomcomdot.com
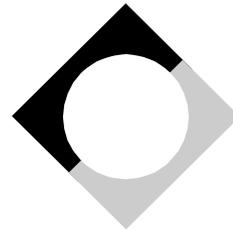
Chairman: Gary Davies BA FCA • Managing Director: Julie Gill

ABC-DEF PUBLICATIONS LTD

Registered office: 62 George Street, London SW21 4DX, England (No. 123454321)

Figure 3.1: ABC Letterhead (Mythical company) – Reduced

Hand-written Letters

Whilst it is commonly perceived to be more acceptable to send typed or word-processed letters in business correspondence, it is important to consider how hand-written text could be advantageous.

Firstly, the signature needs to be hand-written each time it appears; a photocopied signature is sloppy and lacks care for the recipient.

If the letter is typed, then the envelope should be too. Where time is an issue, for example a mail shot to potential or actual customers, use window envelopes.

If you feel that you need to convey additional warmth in response, perhaps, to a letter of complaint or to congratulate a colleague on the success of a joint venture, a hand-written letter may be appropriate. Do not, however, be lulled into thinking that a hand-written letter is a less formal document than a typed letter simply because it may be received more favourably, or that it allows less restrained and planned language than a typed letter.

The style and phrasing of a letter must always be appropriate to its content and context irrespective of the typeface or ink used!

It is perfectly permissible, incidentally, for a letter of application to be hand-written.

Sending a Fax

Modern technology allows us to communicate world-wide in a matter of minutes either by telephone or fax. The quality of fax paper can be the determining factor as to its reception and may lead to faxes being used selectively.

For example, even if your fax machine can reproduce colour logos and uses letter quality paper, the recipients of your faxes may not have such machines. What they receive may be a blurred logo and complicated document or important letter on shiny, flimsy fax paper.

If faxes are to be as effective as letters/posted or hand-delivered written communications, then the following points are worth considering:

(a)   Is your logo/letterhead fax-friendly, i.e. will it reproduce well in black and white?

(b)   Do you ensure that you send your faxes on headed paper and continuation sheets?

(c)   Do you number all pages of the correspondence?

(d)   Is your fax number clearly printed on your letterhead?

(e)   Have you "blocked" the correspondence so that all text will be faxed and you won't lose the top/bottom or words on the right or left?

Try to leave at least a 1.5 cm margin around the entire text on each page.

(f)   How urgent is the correspondence? Would it be better to send a good copy by post or even to hand-deliver it?

(g)   Keep your copy:

(i)   As a record of the correspondence as you would all other correspondence; and

(ii)   For amendments over the telephone which can occur in design briefs, advertising layout, job descriptions and presentation details.

(h)   Remember that it's impossible to make notes or corrections on the flimsy fax paper – you have to go to the trouble of photocopying it first onto better quality paper or rewriting/typing.

(j)   Is it cost-effective to send a 40-page brief by fax?

(k)   A fax is excellent in the following circumstances:

    (i)   For confirmation of details/booking/orders.

    (ii)   As an external memo system.

    (iii)   To send initial drafts or proposals.

    (iv)   As an immediate written response to an external request for data.

Keep It Straightforward and Simple (KISS)

Dealing with written correspondence is often an underrated function in organisations; yet in a marketing-oriented organisation it is recognised as crucial for effective and ongoing relationships with actual and potential customers.

Marketing correspondence is not just about carefully phrased mail shots or sales literature, but what responses are made to customers.

Letters of praise are wonderful to receive and may require an acknowledgement to the sender and careful internal communications to those praised and those not praised. Letters of enquiry or complaint need to be dealt with even more sensitively and should reflect internal communication procedures for dealing with all information received by the organisation.

Hence all information received and transmitted must be planned, evaluated and stored appropriately.

A carefully worded letter of complaint cannot be answered by a hasty fax or telephone call. It requires the same care in its response.

Sometimes you may be in the position to make the letter of complaint and you must be very clear why you are complaining, whether the complaint is justified and if there are any legal ramifications for either or both parties involved.

Responding to complaints should:

(a)   Be as a result of careful investigation as to the facts/events which form the background or basis for the complaint.

(b)   Involve checking the accuracy of statements made and potential responses.

(c)   Be viewed as an opportunity to re-establish good relations with the correspondent and his or her organisation.

(d)   Be recorded as part of the ongoing evaluation process and internal market research.

(e)   Be recorded for the purpose of external market research.

(f)   Be proactive, not reactive.

(g)   Be viewed as an important function of the business communications process.

Using letters of complaint (or telephone calls) in this way can identify:

●   Product issues

●   Internal communication difficulties

●   External communication difficulties

●   Distribution problems

●   Personnel and staff development requirements

●   Re-evaluation of customer perception and later focus

● An improved system for dealing with external communications

The key to the written response to the complaint is to KISS your customer! KEEP IT STRAIGHTFORWARD AND SIMPLE.

Style

You should use the most effective words in the most appropriate order, reflecting the content and context of the correspondence.

Consider the following examples:

Dear Sir,	Dear Dr Smith,
Sorry I can't see you on Tuesday, I'm going to visit my mother.	I regret that I am unable to attend our meeting scheduled for Tuesday 12 July 19... Would it be possible to rearrange it for 19 July 19..?
We are unable to deliver the goods you ordered before mid-April.	The goods you ordered will be delivered by 22 April 19...
As a result of our recent successful interface I feel that we can embrace the concept of partnership and mutual development.	I felt that our meeting was most successful and would like to pursue the possibility of joint ventures.
In view of our recent reorganisation and increase in labour costs, a surcharge is to be levied on all goods from 1 April 19...	A 10% increase in prices – a 100% increase in quality.
	A 10% surcharge is, regrettably, payable on orders under £6 to cover postage and packing.

Use Business Correspondence to IMPRESS

Idea – what is the purpose of the correspondence?

Method – plan and structure your main points.

Paragraphs – open and close your letter.

Recipient – to whom are you sending this letter?

Emphasis – what tone do you want to adopt? Use appropriate language to achieve this.

Style – KISS the recipient.

Safety – check for errors, omissions or even legal ramifications/requirements.

C. BUSINESS CORRESPONDENCE – PRACTICAL APPLICATIONS

Standard Letter Format

The following apply to all types of letter:

(a)   Appropriate greeting   –   "*Dear Sir*", etc.

(b)   Opening paragraph   –   puts the message into a context.

(c)   Middle paragraph(s)   –   develop(s) the detailed message.

(d)   Closing paragraph   –   states action needed.

(e)   Appropriate ending   –   "*Yours*" etc.

Remember that:

"*Dear Sir*"
"*Dear Madam*"
"*Dear Madam/Sir*"   } ends "*Yours faithfully*".
"*Dear Sir/Madam*"

"*Dear Mr Smith*"   } ends *"Yours sincerely"*.
"*Dear Mr Jones*"

also:

"*Dear Caroline*"   } may end, *"With best wishes"*.
"*Dear Alasdair*"

The opening paragraph may refer to previous correspondence, acknowledgement of a telephone call or request, or explain the purpose of the letter. Please avoid "*I am writing to you*" whenever possible. They **know** you are writing to them; what they want to know is **why**.

Middle paragraphs will describe in sequence events or ideas relating to the opening paragraph. Keep these paragraphs short and simple. Don't worry about one-sentence paragraphs; often they have a greater impact and illustrate the sequence better.

The closing paragraph is crucial. If you have avoided waffle prior to this stage, don't introduce it now! This is a summary of what has gone before – don't introduce new ideas or proposals. An effective way of eliciting future correspondence or a meeting is to use a **closed** question or sentence. For example:

> "*I should like to meet you on Tuesday 2 January 19.. at 10.00 a.m. at your premises to discuss these matters further.*"

The recipient has to respond to fix an alternative meeting, to agree the meeting or to discuss why he or she cannot attend or does not feel the meeting to be appropriate.

Letters of Recommendation

The purpose of a letter of recommendation is to persuade the reader or readers that the person recommended has the background, skills and experience necessary for the position.
Such letters are usually confidential and sent out at the request of an organisation, but may be kept on a personnel file for future reference if the person recommended is employed.

A letter of recommendation should include:

- The full name of the candidate (and occasionally other names by which the candidate may be known, e.g. maiden name, Anglicised name).

- The job or benefit the candidate is seeking.

- Whether the writer is answering a request or taking the initiative.

- How long and in what context the writer has known the candidate; also the position of the writer.

- Facts or information relevant to the position or benefit sought.

- The writer's overall evaluation of the candidate's suitability for the job or benefit sought.

As with all correspondence, the writer should avoid over-lengthy descriptions and stick to the key facts. One full side (typed) of A4 or equivalent is usually sufficient for most correspondence of this nature, unless there are particular circumstances which warrant more detail. If that is the case, a telephone call may first be necessary to the organisation making the request.

Dealing with Complaints

(Note that we are considering the text, not layout, in these instances. Obviously these would be produced on appropriate letterheads.)

(a)   Letter

<div style="border:1px solid black; padding:1em;">

27 June 20..

Dear Mr Green,

Re: telephone conversation Wednesday 24 June 19.. – non-delivery of wardrobe

It would seem that you have been unable to trace my wardrobe in your warehouse as a further three days have elapsed since our last telephone conversation and my wardrobe has not arrived.

I have now waited for six weeks and frankly, were it not for the fact that it forms part of a fully fitted (matching) bedroom, would have preferred to cancel my order.

At this stage I would like a guaranteed date of delivery and recompense for the inconvenience you have caused me. I have had to take three days' holiday to date to await delivery of the aforesaid wardrobe.

I would appreciate your earliest attention to this matter.

Yours sincerely,

Mrs J. Brown

</div>

(b)   Response

---

28 June 20..

Dear Mrs Brown,

Thank you for your letter dated 27 June 20..

Your wardrobe will, I'm happy to say, be delivered on Tuesday 7 July 20.. at 10.00 a.m.

Unfortunately there was a design fault and the manufacturers recalled all existing wardrobes until this fault could be rectified.

I enclose a gift voucher for £30 for use in any of our stores.

Please don't hesitate to contact me should you require more information.

Yours sincerely,

Mr W. Green

Letters of Application – Standard Format

A letter of application should:

(a)   Be correctly addressed, dated, etc.

(b)   Acknowledge the source of the advertisement.

(c)   Make a formal application statement and refer to relevant enclosures (e.g. curriculum vitae, application form).

(d)   Link the advertised position with your own current position and aspirations.

If the letter is in place of an application form, and you have been sent a detailed job description, answer the points in the job description in turn, showing how you are the appropriate candidate for this position.

If it is a covering letter, outline your experience, qualifications and personal qualities which you feel appropriate for the position.

Finally, indicate your availability for interview.

Internal Communications – Memoranda

(a)   Formats

Memoranda do not require an inside address, salutation, such as "*Dear Bill*", or a complimentary close, such as "*Yours sincerely*". The format using **To, From**, and **Date** is standard but the order in which these items appear can vary. A reference (Ref) or subject heading may not always be used. Although organisations often have pre-printed memoranda stationery, you should remember to use the MEMORANDUM heading for any memo that you draft for examination purposes.

Memoranda should not be long and should be written in a concise style. Ideally they should relate to one topic only.

Here is an example of a memorandum sent to staff in one company located on two different sites.

MILESTONE MARKETING

MEMORANDUM

To: All Staff

From: Chris Weber

Managing Director

Date: 19 May 199.

Subject: Fire Drill Procedure

Last week's fire drill was not carried out successfully. In fact many staff ignored it and carried on with their work.

The correct procedure must be adhered to and any member of staff who does not comply with this instruction will be disciplined.

Not only is it a legal requirement that all organisations carry out regular fire drills, but it is also an essential safety procedure organised to ensure the safety of staff in the event of fire.

The next fire drill will take place on Monday 20 June and on hearing the continuous bell staff must:

(a)   Stop work immediately.

(b)   Close all windows and the last person leaving a work area should close doors as they vacate the area.

(c)   Leave the building quickly and calmly through the nearest fire exit.

(d)   Not use the lifts.

(e)   Congregate at the designated meeting points outside the building.

It is imperative that all employees follow these instructions and familiarise themselves with the fire procedure notices in their section which identify fire exits and meeting points.

Figure 3.2

(b)   Purpose

Memos are ideal for interdepartmental correspondence where a formal response needs to be noted and acted upon.

Usually they are requests for information required in a short time period, or may issue orders or changes in procedures.

As a formal channel, it is perfectly acceptable to refer to memos, dated such and such, regarding such and such a matter, in other forms of correspondence.

They must always include the date sent, name(s) of the recipient(s), the sender's name, the purpose of the memo and action required.

Briefs

A brief can be an internal or external communication, often depending on the size/function of the organisation. Here are some examples:

Internal:	**External:**
Brief to graphics department.	Brief to external designer.
Task-based to employee.	Brief to architect, builder, IT consultant, management consultant.

External briefs may often spend some time describing corporate strategy and ideology, whereas internal briefs will be more task-specific and less conceptual.

For example, an external designer will need to know something about the organisation and the purpose and function of his or her designs. An internal graphic designer may well be asked to produce a document/illustration for an internal department in a brief where corporate issues are not discussed.

A brief should be a document which is carefully structured and purposeful, designed to meet clearly specified objectives in a designated time-scale and at an agreed cost. Sometimes the cost is agreed on a tendering basis, where several external agencies receive the brief and submit their responses and costings. Advertising agencies are a good example of this.

One thing is certain – few briefs are brief! In 1994 British Airways commissioned a 40-page brief to designers for the design for their new uniforms and corporate identity.

Unlike a report, a brief is designed to elicit, not give, information. It is still reliant on clear, careful, concise language and will reflect a formal, not informal, style.

A sloppy brief will result in sloppy information or results.

D.   REPORTS AND REPORTING

The Reporting System

Much internal business communication will be characterised by its reporting procedures as determined by the channels within the organisation and the type of organisational structure used.

Every employee will have to report to someone whether it is:

●   A section head

●   A department head

- A senior manager

- A colleague

- An auditor

There are also occasions requiring reporting such as:

- Team briefings

- Presentations

- Meetings with shareholders, directors or the chief executive

The business report is the document used for the formal dissemination of specialist, researched information. The commission and production of reports is crucial to the achievement of the objectives which organisations set themselves.

Reports are likely to reflect issues which affect personnel, finance, production, marketing, managing the business or external political or economic factors which could determine changes for running the business effectively.

Not all reports arrive on your desk the size of the Yellow Pages and just as interesting. The success of a report is reliant on the report writer being given a clear remit and brief for the context and content.

There has to be an agreed process for the dissemination and evaluation of the report once it has been written. There must be an evaluatory mechanism for dealing with any recommendations which are made.

Reports are not always written – sometimes brief oral reports or summaries of meetings are all that is required as the reporting mechanism.

Classification of Reports

Reports can be classified in the following ways:

(a)   Regular and Routine

These include:

- Health and safety

- Maintenance

- Progress

- Staff appraisal

- Sales

- Production targets

- Financial

They are characterised by a standard format to allow comparison between the current and previous reports, and standard procedures for implementation and evaluation.

Some of these reports will go to monthly meetings where recommendations or problem areas (e.g. sales targets not being met) will be discussed.

(b)   Occasional Reports

Examples of these might be:

- Accident

- Disciplinary

- Local authority

- Financing body

Again there are most likely to be standard forms (not even formats) to be completed. Often these will be legal requirements and need to be stored in a particular way and only authenticated by designated personnel.

(c)   Specially Commissioned Reports

These could include:

- Market research

- Personnel

- Investigatory

- Policy changing

- Market forecasting

- Production

- Investment in new equipment

- IT strategy

- Special interest

These especially commissioned reports will form the basis for company policy and will include recommendations as to how best to implement company strategic development objectives.

We shall concentrate here on specially commissioned reports.

Business Report Formats

The usual format of a business report is as set out Figure 3.3 following.

For very lengthy reports, an **executive summary** may be circulated with the report, prior to the report or as an alternative to the final report. It is often the basis for an oral presentation of the report and allows for discussion as to its main features and recommendations rather than wading through every page. The executive summary would contain an outline only of the following elements:

- title, author and aims of the report;

- methodology and findings;

- main recommendations.

A short formal report is usually three-part and probably no longer than 20 pages. It will include:

- Introduction – aims, objectives, background.

- Findings – sources.

- Conclusions and recommendations.

(Introduction)

1. Title.

2. Author (name, title, status as necessary).

3. Identity of the person who commissioned the report.

4. Date report presented.

   (The date it is commissioned or the date it was actually completed will not be the same as the published or presented date. A report "comes into being" on its presentation as a live document. Prior to that date it is a draft or work in progress.)

5. Acknowledgements.

6. Table of contents, pagination.

7. Status, e.g. confidential.

(Main Body of Report)

1. Background/history/introduction/terms of reference/aims and objectives.

2. Methodology/procedure.

3. Findings, statistical data, etc.

4. Conclusions.

5. Key summary.

6. Recommendations.

7. Footnotes (if appropriate).

8. Appendices (including copies of questionnaires, standard letters, etc.).

9. Index.

10. Bibliography.

11. Circulation list (this may also appear at the end of the Introduction section depending on the status of the report).

Figure 3.3

Writing a Report

Report writing lends itself to a more formal, factual and objective style. It is an analysis of a situation characterised by clear, purposeful research, a summary of the main findings and realistic recommendations. Prejudice or emotional responses to the findings or research are inappropriate.

Many reports require some primary as well as secondary research. This must be carried out without bias or prejudice, otherwise the findings of the research are irrelevant and inappropriate. One of the ways in which objectivity is seen to be employed is by referring to the process, findings or recommendations in the third person – hence, *"I found out that"* becomes *"It became evident that"*.

If the writer has received a proper brief as to the purpose, use and dissemination of the report, then it is easier to use appropriate tone and style from its inception.

The writer needs to be clear as to the following:

- Who has commissioned the report? For what purpose?

- What are the objectives of the report?

- What is the time-scale?

- Who is to receive the report? What do they need the information for? How will they be able to act on the recommendations?

- What costs are likely to be incurred in the production of the report? Are these borne by a department or section or unit, or does a request for additional funding need to be made?

- Is it a formal document?

- Will it be published to external organisations?

- What language will be appropriate?

- How important will technical words and phrases be to the understanding of the report's purpose and intent?

- Is there a required format for the production of the report?

- Will an executive summary be required?

- What assistance, if any, will be available from others within the organisation?

- Will there be a requirement for progress reports or a draft report before presentation or publication?

- Will the author be required to present the report? When? To whom?

Reading a Report

Not only will you have to write business reports, but you will also be expected to read, understand and respond to key issues in the reports that others write.

You will use reports as the basis for your market research on any issues which may concern your organisation, such as government reports which indicate a shift in government funding or spending, or support particular initiatives.

Sometimes you may be asked to present the key issues of a particular report and the impact that this report will have on your organisation. At other times you may decide to read a report in its entirety as a result of a summary of its findings in a newspaper or national news bulletin, or on receiving an executive summary.

Sample Reports

Over the next three pages we set out some samples of short reports to illustrate the above points about style and structure.

(a)   Informal Report

REPORT ON NEGOTIATION SKILLS TRAINING COURSE

For the attention of: Ben Firth, Marketing Director

From: Hugh Heaton, Marketing Assistant

1.   Introduction

This report provides information on the value and effectiveness of the recent Negotiation Skills course which Hugh Heaton attended on 4 December 199..

2.   Findings

2.1   Course Details

The course took place at the Willow Bank Hotel on 18 November 200X. from 6 p.m. to 9 p.m. and was run by the Chartered Institute of Purchasing and Supply. The cost of the course was £150.

2.2.   Course Content

The course was delivered with a mixture of input, case studies and interaction with the audience. The course was well organised with good supporting materials in the way of handouts and illustrative material. The trainer's delivery was clear and he successfully maintained the interest of the audience.

The topic of negotiation was dealt with from a buying and selling perspective and provided comprehensive coverage of skills, guidelines and tactics.

It would have been improved slightly had there been an opportunity to practise skills learnt. Had the course been of a longer duration, it would have been possible to use a role play simulation for participants to demonstrate their skills.

3.   Conclusions

The course was effectively delivered and well-run. The content was comprehensive but lacked the opportunity to put newly-learnt skills into practice.

4.   Recommendations

Other members of staff who are involved in purchasing materials and supplies should attend this course when it runs again early next year.

I recommend that there is some follow-up in-house training so that staff can practise implementing their negotiating skills.

(b)   Memorandum Report

<div style="border:1px solid">

<p align="center">**MEMORANDUM**</p>

To: Lisa Edwards
        Personnel Manager

From: Hilary Humphries
        Personnel Administrator

Date: 19 October 200X.

Ref: NR/BL

Subject: Pilot Flexi-time System

The following observations were made with regard to the flexi-time system which was piloted over the last three months.

Use of the System

(a)   Most staff have taken advantage of the flexi-time system during the last three months.

(b)   None of the staff using the system exceeded their limit of days owing.

Implications of the System

(a)   The rules relating to the core time have meant that neither customers nor the general flow of work has been disrupted in any way.

(b)   Staff morale has improved due to the flexibility of the system. There has been a significant decrease in absences amongst staff during the period of the pilot scheme.

(c)   The administration of the system has involved more work for Mrs Graves in the administration section than was originally planned.

</div>

(c)   Formal Report

REPORT ON INSURANCE SECTION'S TELEPHONE TECHNIQUE

For the attention of: Nicola Bingley

From: Sam Daniels

1.0   Terms of Reference

The quality circle team was requested to investigate the problems with the telephone service in the insurance claims section.

2.0   Procedure

2.1   Telephone technique in the insurance claims section was observed.

2.2.   Complaints from customers and members of staff were looked into.

2.3   Staff in the insurance claims section were interviewed.

3.0   Findings

3.1   Staff were slow to answer the telephone and there were not enough staff to deal with all the calls. Telephone etiquette was observed to be inadequate. Staff frequently failed to identify themselves and their department, and customers were frequently left on hold for long periods while files were being located.

3.2   Staff often promised customers and staff in other sections that colleagues would return their calls but they did not. Messages were not often taken and it was noted that the section did not have a stock of telephone message pads.

3.3   Junior members of staff were reluctant to deal with incoming calls because they did not feel capable of dealing with many of the complicated queries received.

4.0   Conclusions

It is evident that staff in the insurance claims section are not providing an adequate telephone service. They are extremely busy and there is an obvious staff shortage. Messages are often not relayed because message pads are unavailable. Junior staff lack training to deal with the more complex queries. All staff need training in telephone technique.

5.0   Recommendations

5.1   Additional staff should be employed in the insurance section.

5.2   All staff should be provided with a stock of telephone message pads.

5.3   Junior staff should undergo specialised training, provided by senior staff, on some of the more complex incoming enquiries which the section receives.

5.4   All staff should attend a training course on telephone technique.

Signed on behalf of the quality circle team:

Dated:

E.   WRITING ARTICLES

There is a great deal of difference between an article, an essay and a report. The style and language of an article will vary according to the readership, i.e. who you are writing the article for. The readership depends very much on the type of publication, e.g. a professional or technical journal will have a more technically-oriented reader than will a general interest magazine or an in-house company newsletter. The subject matter will also influence the style and language which should be used in an article.

The title and the opening sentence need to attract the eye of the reader and encourage him to continue reading. Technical jargon and long, complex sentence structures should be avoided wherever possible.

The facts should be placed in a logical order, e.g. chronologically or in order of importance. If an argument is being presented both sides of the argument should be considered, building up to the final conclusions. The concluding paragraphs should sum up the argument or discussion and not be used to introduce new material.

Separate ideas and arguments into clearly defined paragraphs. An article can be usefully divided into different sections, with sub-headings, just as they are in newspapers and magazines.

There is a quick formula for counting how many words you have written. Firstly, count the number of words you have written on a few different lines; secondly, calculate the average number of words you have written on a line; finally, count the number of lines you have written and multiply this sum by the number of words you have averaged on a line. This calculation will give you an approximate idea of the total number of words you have written.

F.   PREPARING AND PLACING A PRESS RELEASE

Writing a Press Release

Writing a press release involves very different skills from **placing** a press release. A press release is unpaid for advertising but written in a "news" style. Properly speaking, press releases are part of a public relations plan.

A press release may concern charitable work, donations, sponsorship or a product/service launch, but has to be of interest to the editorial team at the publication(s) you select.

- A press release should contain the following detail in its first paragraph:

    (i)   what

    (ii)   who

    (iii)   where

    (iv)   when

    (v)   why

    (vi)   how

- It should have a catchy title (puns are very popular in local papers).

- It should be no longer than one side of A4.

- It should be typed, double spacing where possible.

- It must contain a contact name, address and telephone number. This should be at the bottom of the sheet after the word "end".

- It is worthwhile including a relevant black and white photograph.

- Give the press release a date.

- Do not underline anything – key points should be obvious. The editorial team may choose to italicise or subdivide the details.

- Give an embargo date if necessary.

- Include a relevant (positive) quote where possible.

Make sure you keep a record of all press releases you send out (they're useful for other promotional activities) and to whom you send them.

Placing a Press Release

Research which publications would be appropriate. Find out the names of the editors and features staff. Introduce yourself to them even before you have any releases to place. If you are already advertising in that publication, it may be possible to negotiate a small release at key times. For example, a car sales company may advertise on the same page as a release about a new marque which they are now stocking.

Familiarise yourself with the style and issues which concern the publication. Find out if they plan any special editions or features which would benefit your organisation, were it to be represented in these "specials".

Always thank the publication for their assistance and seek their advice if appropriate.

Think of fresh ways of presenting your company. A press release is not a free advertisement; it is usually part of a public relations exercise. It will reflect good news. Restaurants offer journalists the opportunity to try their cuisine and then to write about it in their "Dining Out" section. Driving instructors may choose to offer driving lessons to a journalist.

Remember that if you are using a local paper, then your press release has to be of local interest.

If you are placing a press release in a national publication, it is more likely to be product/service specific and you will probably have targeted specialist publications or specialist sections of national newspapers. This will include new advances in technology.

What you must keep in mind is that an advertisement will be in the style and in a publication appropriate to your identified target market; a press release is targeting the publication (i.e. its editorial staff) as well as your identified target market.

Sometimes, of course, a publication may choose not to publish your release.

Typical Press Release Layout
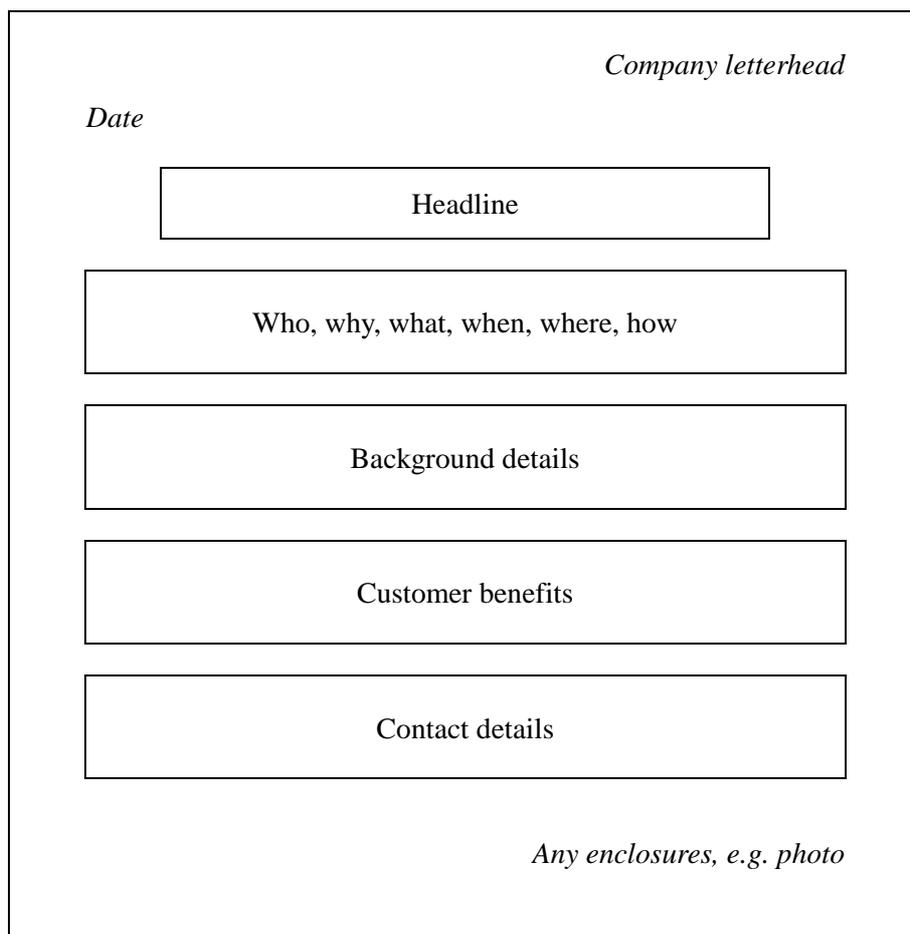
Figure 3.4

Remember:

- Never underline anything.
- Avoid exclamation marks.
- Do not start a sentence with a number.
- Check spelling and grammar.

An Article from a Press Release

The following article (Figure 3.5) illustrates how a press release may become an article in a newspaper. The information that has been left out is how to get nomination forms. Remember that your press release is unlikely to be reproduced in its entirety, so make sure that you include **all** the relevant facts.

Healthy eating choice can take you to Paris

IDENTIFY Ulster's best eating out spot and win a trip to the gourmet capital of the world.

That is the tasty incentive offered today by the Health Promotion Agency.

It is seeking nominations for Northern Ireland's Healthy Eating Circle awards of excellence — the competition to find caterers who provide food that really does you good.

Members of the public who fill in nomination forms have a chance of winning a week-end break for two in Paris next spring.

A total of 438 establishments, including hotels, coffee shops, pubs, school and workplace restaurants are now members of the Healthy Eating Circle — a 50pc increase on last year's total.

Margaret Slane, the agency's marketing manager, said: "That means more people now have the opportunity to opt for healthier foods served in non-smoking areas with a special emphasis on hygiene."

There are four categories:
● hotels and restaurants.
● self-service restaurants, coffee shops, pubs, guest houses and take-aways.
● restaurants in workplaces and further education colleges.
● school dining rooms.

Figure 3.5

(Source: Belfast Telegraph, 20 September 1994)

Example

The following example illustrates the points above. It shows a (fictitious) press release to be sent to several local magazines and newspapers by the marketing assistant at the local leisure centre which is keen to find ways of extending the membership and increasing the number of users. It follows several improvements to the facilities – new showers, extra steam rooms, and the refurbishment of the bar by the Boddway Brewery.

<div style="border:1px solid black;">

WESTOVER LEISURE CENTRE

Press Release

Date: 12 June 200X

Westover Leisure Centre's New Look

Following a massive refurbishment programme our local leisure centre has made drastic improvements to its facilities.

The showers have been replaced with a more powerful version so that a strong spray of water is guaranteed. Temperature control is much better and new cubicle doors give more privacy.

Two additional steam rooms have been built to cater for the massive demand for this facility. The cold weather, in particular, seems to encourage more people to want to have a hot, relaxing steam bath.

The Centre's manager, Steven Lee said: "Many of our customers are using the centre more as a social outlet and although they are keen to use the sports facilities, many like to socialise in the bar. That's why, in addition to improving some of the facilities, we have negotiated with the Boddway Brewery for a total refurbishment."

The new look bar includes new seating and non-smoking areas. The walls no longer have a white clinical look and the lighting consists of a series of wall and concealed ceiling lights.

"The whole atmosphere is more congenial and welcoming. We expect to have lots of bar promotions as well," said Mr Lee. "Most people try us out once as guests and then become members because they get hooked on the whole experience."

Guests wishing to use the facilities can do so by paying a £3.00 entrance fee. Those intending to join as members should take advantage of the old rates before increases in September.

END

For further details please contact Ravi Manju, Marketing Assistant, at Westover Leisure Centre, Westover Road, Assington 01234 594666.

</div>

G.   WRITING AN EFFECTIVE MAILSHOT

Marketing letters or circulars are generally sent to a large audience and may or may not be personalised.

They are often used to send out information about products or services with the aim of persuading the reader to send off for more information or to order products/services. Sometimes they are sent in response to a request or they are unsolicited mail.

Generally this type of letter has to be written in a persuasive style and must convey an air of congeniality to overcome the impersonality of mass communication. This is achieved by the use of friendly, cheerful language. Rhetorical questions are used and the audience is often offered an incentive to reply by a certain date.

Very importantly, the letter or some component of the mailshot should contain a response mechanism, i.e. an easy to complete coupon, freepost address or reply paid envelope.

Information technology means that circular letters can be personalised, based on the information held on databases.

Example

The following is a (fictitious) circular to customers of a branch of the Midshire Bank plc informing them that a market research survey is to take place over the next few weeks. The bank has appointed TMI Limited to conduct telephone interviews with a random sample of customers. The letter seeks to persuade customers to cooperate by giving their views, but also explains that not all customers will be chosen to be part of the sample and reassures them that their responses will be completely confidential.

MIDSHIRE BANK PLC
High Street
Assington
Berkshire
AS1 6EL

Mr A Customer
17 Goldthorpe Way
Didsbury
Berkshire
DKS1 3FF

12 June 200X

Dear Mr Customer

At Midshire Bank we try to provide banking facilities of the highest quality in order to meet our customers' needs. To do this we need to listen to what our customers say.

To help us do this, we have asked TMI Limited, an independent research company, to interview a number of our customers. TMI will be conducting their interviews by telephone over the next few weeks.

I would be very grateful, if you are contacted by TMI, if you could assist them in their research. We would certainly like to hear your views and opinions on our services.

May I take this opportunity to assure you that TMI is a reputable company and your individual responses will be completely confidential, according to the Market Research Society's Code of Conduct.

Yours sincerely

Milly Brown
Manager

Study Unit 4

Oral Communication

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INTRODUCTION

In this unit on oral communication we shall be concentrating on the art of ensuring an effective presentation. We shall be drawing on some of the basic principles discussed in Unit 2, and you should note the links to the unit on visual communication which follows – particularly the use of audio-visual aids and on the presentation of statistical information.

Presentations may be five minutes or two hours long, but the basic precepts will be the same – the conveying of a specific message to an identified audience at a designated time and place. Similarly, the purpose and content of each and every presentation which you may make will vary tremendously, but the skills needed to ensure that they are all effective will be the same.

We start by examining the organisation of presentations and considering the fundamental importance of proper preparation. We then go on to the presentation itself, looking at the elements which contribute to its effectiveness and the particular skills that are needed.

The unit concludes with a review of another important area of oral communication, that of using the telephone. Telephone conversations are a unique form of such communication in that they lack many of the non-verbal cues which are so important to the communication process, and we shall consider the particular demands of such interactions and how to make them effective.

A.   ORGANISING A PRESENTATION

We shall, in this first section of the unit, assume your role is as the organiser, co-ordinator, facilitator or convenor of a presentation. Thus, a deliberate distinction is drawn between the roles of **organiser** and **presenter**, because you need to be aware of the different communication skills applied in each context. Although sometimes organisers of presentations may also be requested to be active participants in the presentation itself, the majority of presentations are more effective if this does **not** occur. A presenter does not or should not need to worry about the arrangements surrounding a presentation, and an organiser does not or should not need to worry about making an effective presentation.

The organiser is the only person who can have an effective overview of the success of the proceedings and implement minor adjustments as necessary. Similarly, the organiser is the best person to evaluate the presentation untrammelled by concerns as to his or her performance.

Organisation and Planning

Whatever the context or proposed content of your presentation, it will require careful planning. All of the following elements will form part of the planning process – some will run sequentially, others concurrently, so you may well be arranging speakers at the same time as booking the venue.

(a)   Preliminary considerations

- What is your status as an organiser (e.g. total control, reporting to superiors, reporting to presentation team)? What sort of organisation are you working for?

- What type of presentation are you organising? Is it fee-paying, paid for, part of an existing public relations calendar, a meeting, a conference, a seminar?

- By whom and how will the objectives be set? What are they? Who determines the budget? Who reports to whom?

(b)   Work before the event

- Attend all necessary team briefings and meetings.

- Make up a file summarising all the activities you will need to organise, who your contacts are, time-scale, deadlines and budgeting.

- Check that you understand the requirements of your audience. Who are they? Where are they?

- Location:

    (i)   Book the venue according to the requirements and budget.

    (ii)   Confirm the arrangements.

    (iii)   Check whether there are any potential sponsorship/advertising opportunities.

    (iv)   Check the travel arrangements.

- Arrange speakers.

- Invite the audience.

- Special arrangements for the day itself:

    (i)   Floral displays.

    (ii)   Audio-visual aids.

    (iii)   Music.

    (iv)   Lighting.

    (v)   Sponsorship.

    (vi)   Food and refreshments.

    (vii)   Media coverage.

    (viii)   Press release.

    (ix)   Advertise event in relevant medium/media.

    (x)   Access and cloakroom facilities.

    (xi)   Arrange supporting material/presentation packs.

    (xii)   Arrange signs, name badges.

    (xiii)   Caretaking.

- Discuss potential follow-up activities at team briefings and make arrangements.

(b)   At the presentation

- Meet/greet the speakers and audience.

- Double-check all previous arrangements.

- Keep a time check on the speakers.

- Liaise with catering staff.

- Remain a point of contact for all speakers and audience members to deal with any eventuality.

- Distribute supporting material/presentation packs.

- Arrange photocopying facilities for speakers' material in case copies are required.

(c)   Work after the event

- Ensure all parties have been paid, invoices received, etc.

- Circulate any necessary follow-up documentation to participants (this may include evaluation questionnaires). Thank speakers and participants for attending, etc.

- Present the final budget sheet.

- Attend post-presentation briefing and report back to teams as necessary.

- Throughout the planning process and then, subsequently, keep the internal market aware of the purpose of the event, its success and the future implications (if any) for the organisation.

It is important to be aware of a number of general principles about presentations as these affect the approach to their organisation. For example, you can safely assume that you have interesting/relevant information which needs to be communicated to others, and that the communication will be part of a formal process (internally or externally).

However, there are a number of important points about presentations which you **cannot** assume and which must, therefore, be specifically addressed in the organisation and planning leading up to the event.

- All presentations are of a standard length.

- All presentations are directed at an audience of five people.

- All presentations take place externally.

- All presentations require sophisticated audio and visual aids.

- All presentations are successful.

- All presenters are equally prepared/skilled at presenting.

- Your materials speaks for itself.

- Your personality, choice of language and style have no bearing on the effectiveness of your presentation.

- The audience is eagerly awaiting your every word.

- You have an unlimited budget.

- All presentations take place in exclusive hotel conference suites.

- You are, or you superior is, the best person to make the presentation.

- You have the support of your internal market.

- Advertisers and sponsors will be falling over themselves to participate.

Finally, we can note a number of points about which you can be certain and which, again, you will need to address in the organisation and planning.

- Presentations make use of a wide variety of communication skills.

- No two presentations will be the same.

- Individual style has a tremendous influence on the reception of a presentation.

- Organising presentations is extremely hard work!

Types and Styles of Presentations

(a)   Internal Presentations

Within an organisation presentations are used to:

● Brief relevant teams, groups, committees.

● Inform such teams, groups or committees.

● Raise issues for discussion.

● Illustrate strategic developments (for example, presenting your section's five-year plan or sales figures).

These presentations may involve as few as two staff or the entire workforce. "Making a presentation" is a formal communication process with objectives usually set by senior management.

Any promotional activity surrounding a presentation – perhaps a meeting to discuss company employment policy – will make use of existing internal communications channels.

Many organisations insist that middle or senior managers hold a progress report meeting on Monday mornings. This is another form of presentation. The managers are relaying key information to directors or executives.

What is certainly true of all presentations, be they internal or external, is that the presenter can be selective above the information which he or she presents.

The key skills are to know how to summarise relevant data effectively, to understand the requirements of the audience and be prepared for any "sticky" questions.

(b)   External Presentations

Because these involve people from outside your organisation, they are sometimes viewed more seriously. Shareholders' meetings, press conferences, after-dinner speeches, formal introductions, trade exhibitions and advertising pitches are all types of external presentation.

Such presentations are more likely to:

● Take place in a neutral location (e.g. a hotel, conference suite, etc.).

● Involve some advertising or promotional activity using external media.

● Involve more than one presenter.

● Form part of a public relations budget.

● Be acknowledged as formal marketing activities, i.e. be worthwhile and high status.

● Need careful co-ordination and attention to detail.

● Require sophisticated interpersonal skills on the part of organiser(s) and presenter(s) alike.

The style of an external presentation will be determined by the corporate image of the presenting company, and the perceived requirements of the audience, whereas the style of an internal presentation will be characterised by the role and status of individuals making the presentation and their own personal style.

Furthermore, participants making up the audience for an external presentation such as a seminar or conference may have paid for the privilege of so doing. It would be extremely unlikely for the audience at an internal presentation to have been charged admittance!

The Context of the Presentation

Presentations are a facet of organisational activity. Thus, whether they are internal or external, corporate strategy or objectives will have determined the context, background or rationale for the presentation. Furthermore, the organisational culture will have a strong impact on who is selected to make presentations and to whom – for example, a matrix organisation is more likely to encourage presentations across departments or by junior staff than a hierarchical/bureaucratic organisation.

If you are the organiser of the presentation, you need to be familiar with this organisational context and to consider the following questions:

- What is the purpose of the presentation?

- Will I have total control as to the style, format and context?

- Who will I have to report to? When? With what information (e.g. progress, financial, promotional activity, etc.)?

- Who will I be working with? Internally? Externally?

- Do I need to set up a presentation team?

- Is there a budget? How has it been set?

- Are there any restrictions on hiring specialist presenters?

- How does this activity fit in with other organisational activities (for example, a marketing strategy or calendar)?

- Will the audience be paying for this activity?

- Who are the intended audience? How have they been selected? Do I need to recruit an audience?

- What public relations/advertising/promotional activities will I need to arrange?

- Do I need to co-ordinate with other departments in the organisation?

- What support will I have (administrative, extra people, teams, authority)?

- What is the time-scale for the event?

- How will the presentation be assessed?

Internal Communications Processes

When organising any presentation, you need to know who are the key internal members of staff with whom you will be working – for example:

- the senior management team

- the chief executive

- caretaking and cleaning staff

- administrative staff

- maintenance staff

- department heads

- presentation team drawn from throughout the organisation

Having identified these people, you will have to make effective use of the existing internal communications system. It is not always practical to arrange meetings with all concerned. For example, caretaking staff could be involved in the setting up and cleaning up for ten presentations in one organisation. If they attended meetings with all presentation teams, they would probably never do anything else!

Interpersonal communications will be critical to the success of your venture. However, if you rely on everyone's word after a brief chat as to your requirements, you may well discover that:

- they've misunderstood your requirements;

- you haven't stipulated the date, time, location or purpose;

- you were discussing a hypothetical presentation and not a **real** one.

It is essential, therefore, that your requirements are clarified or determined in writing. Presentations are a formal communications process and use formal communications channels. You must be prepared to use briefs or short reports as to how you are to set up the presentation, internal memos for co-ordination and properly drawn up planning and costing sheets to monitor and control the organisation and budget.

The Planning Process

Your plans for the presentation will be determined by the budget and time-scale. Within those constraints you need to identify and plan all those activities which you will need to organise, including key personnel and administrative procedures.

It would be sensible to set up a file with the following sections as headings and to include all internal and external correspondence/relevant data:

- Title, date and timing of presentation

- Location

- Speakers

- Catering arrangements

- Invoices

- Advertising and promotional activities

- Special arrangements

You will also need a chart showing planned activities on particular dates – for example, date of presentation, team briefings, meeting with hotel managers, guest speakers, etc. (See Figure 4.1).

Presentation Plan: Product Launch "Marvo"

May 199.

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Team briefing to establish elements of presentation. Budget allocated. Set up file.	Select location according to requirements. →	→	Review available presenters - set up interviews.	Interview 2 p.m. Joan Smith. T B A
Week 2	Draft plans for advertising and invitations.	Interview 10.00 a.m. Julian Green.	Check invitations and audience list. Send out. 3 p.m. Interview) To be 4 p.m. Interview) confirmed A	See florist.	T B A
Week 3	Team update/review of progress. A	11 a.m. Meeting with caterers. 1 p.m. Meeting with exhibition co. A	Try to confirm attendance of some of invited audience.	Send out presenters' contracts and confirmation to other parties.	T B A
Week 4	T B A	T B A	T B A	Confirm arrangements with hotel, caterers, florist, speakers, etc.	Rehearsal ↔

Figure 4.1: Initial personal planner

The time-scale will be dependent on the range of activities and research necessary, and this may be a function of the complexity of the planned event. For example, you may need to:

● Choose a location.

● Select catering facilities.

● Interview speakers and brief them.

● Write press releases/programmes, etc.

● Liaise with the local press/media.

● Target a particular audience and make up your own database of potential participants.

● Check corporate requirements on promotional activities/colour schemes, etc.

● Arrange printing.

This will involve a lot of meetings, telephone calls and faxes – all of which must be recorded and filed. Whilst much of this can be held on computer, a physical file has the advantage of containing all the documentary evidence – expense claims, invoices, internal memos, invitation letters, etc.

Target Audience

Very early in the planning process you need to know who are the intended audience for the presentation. You then need to anticipate the needs of the audience and structure the presentation accordingly.

Perhaps more importantly, you need to inform your audience of the presentation and request their attendance. In may cases, you will know who the audience is and there may well be an expectation on their part of attending. Thus, internally, it may be that the audience has requested the presentation or that everyone recognises the need to attend. Similarly, externally, the audience may request a presentation – you may be a manufacturer supplying a retail outlet which wants to know more about your range for the next season. The presentation could be an Annual General Meeting where shareholders (the audience) have particular concerns about your organisation and require very specific information about corporate issues.

However, the audience may well be an externally invited audience, specific to the particular subject matter of the presentation – a product launch, a recruitment drive, a public relations press conference after an industrial accident (essentially a damage limitation exercise), etc. If this is the case, then you need to:

(a) Identify your target audience.

(b) Locate your target audience.

(c) Choose the most appropriate channel of communication to inform/invite them.

You need to be aware of any special requirements your potential audience may have, such as:

● Dietary requirements.

● Access to meeting/presentation rooms/location.

● Market-sensitive costing structure.

● Necessary length of the presentation.

● Timing of the presentation (cereal and grain farmers are, for example, much more likely to attend conferences between November and February after harvest and before replanting).

● Crêche facilities.

- Medical facilities.

- Adherence to health and safety legislation.

- Translators.

Presenter's Briefs

As an organiser, it is your role to ensure that the presenters themselves are properly briefed and can, therefore, communicate effectively and achieve the objectives of the event. Getting the most out of your presenters is obviously best achieved by having clear objectives as to the purpose of the presentation and an understanding of the audience requirements. However, some can choose their presenters, others have presenters thrust upon them, and still others will have to reach presenter status themselves!

The key is to ensure that your presenters know exactly what is required of them and this is achieved by preparing a presenter's brief. This will set out the following elements:

- The purpose of the presentation

- An audience profile

- Details of date, venue and timing

- Terms and conditions for presenters

- Communication skills required

- Technical or specialist knowledge required

- Any special requirements – particularly as to company policy on certain issues (for example, in respect of gender and racial inclusivity), notification of audio-visual aids needed, etc.

B.   PRESENTATIONAL SKILLS

Presenting information, proposals or ideas to someone else should be easy. After all, you just need to talk to them, reach agreement and take appropriate action. If only it were that simple! As you have seen from previous study units, there are many barriers to effective communication and the most important one is ourselves. Too often we assume that because we understand the importance/relevance of our plans or proposals, then so does everyone else. We forget to introduce the stages or processes of our thinking, which would illustrate how we reached the conclusions we are presenting. We get bogged down in a mass of detail which disguises the simplicity of an idea. Sometimes we are overawed by our audience, or lack commitment in our ideas or judgement.

In order to present ourselves and our information effectively, we need to show evidence of what might be termed the 6 Ps of presentation:

- Planning

- Purpose

- Political sensitivity

- Personal commitment

- Personal communication skills (ability to persuade)

- Polish

We shall examine these in detail later, but first we shall look at some of the key elements of making a presentation and the different demands of different types of presentation.

Key Presentational Elements

The main elements which make up an effective presentation may be summarised as in the list below. You should consider this as a checklist to be directly and carefully addressed when planning the delivery of any presentation.

- Understanding the difference between written and spoken communications

- Oral communication skills (style, delivery, rapport)

- Using non-verbal techniques

- Understanding your audience's requirements

- The ability to interact with an audience

- Preparation and planning

- Knowing your subject

- Presenting enough, but not too much, information/data

- Careful selection of information/data

- Summarising salient points

- Using appropriate visual aids

- Timing

- Reflecting corporate objectives accurately

- Working in a team with other presenters, presentation organisers and/or senior management

We shall be concerned, in the following parts of this section, with illustrating these skills and how you can make your presentations more effective by paying particular attention to them.

Types of Presentation

Not only does the size of the audience, the subject matter, time-scale or location vary from presentation to presentation, but also the purpose – which determines those factors – will vary enormously. The key to making a successful presentation is understanding this context and you need to ask yourself:

- What is the purpose?

- Who is it for?

- What is my role in this?

- Who are the audience?

- How will it be judged? By whom?

- Are there any specific requirements/criteria which have to be met?

We can categorise the types of presentation you are most likely to have to make according to the audience and/or context. Thus we could identify the following types:

- to prospective employers at a job interview

- to senior managers

- to colleagues

- to potential clients – planned "pitches", etc.

- to actual and/or potential clients – product launches, etc.

- at exhibition stands/trade fairs

- at in-house training/staff development activities

- at company conferences/as an invited speaker

This form of classification provides a useful means of starting to analysis the impact of the context on the form of presentation. In each of these instances, the context will determine how you approach the planning, design and execution of your presentation. Thus, it will not always be appropriate to use audio-visual aids, and sometimes you will be alone, whereas at other times you will be part of a team of presenters. Note, too, that your status will vary in the different situations and this will affect how each audience perceives you, your organisation and the validity of your arguments/presentation. The degree of predictability of how the presentation will go may also vary with the context – for example, if you are presenting specific information, as at an interview or trade fair, you will have to be prepared for non-scripted or apparently unrelated questions/requirements from your audience.

Figure 4.2 illustrates some of the considerations involved in this range of presentation types.

Context	Potential Audience/Size	Specific Requirements	Skills/Special Factors	Evaluation Process
Job interview	1-8	Set by interview panel: subject and timing.	Keep calm, to the point and make considered responses. Plan/rehearse beforehand.	Employment as a direct result of interview.
Exhibition stand	Could be hundreds, but probably viewed in groups of 1-5 at a time.	Representing your organisation. Need up-to-date product/service knowledge.	Be prepared to answer questions on a variety of topics, not just new products.	Additional orders. New clients. Reduced orders.
Senior management	1-6 Probably a projection/ planning presentation on sales/accounts.	Relevant; factual; most likely to be on sales or financial forecasts; accurate.	Accept criticism calmly. Present supporting data for any suppositions you make.	Retention of status. Promotion/demotion. Will feed into company appraisal scheme.
Colleagues	1-8 Most likely to be a team briefing.	Establish rapport with group. Must not patronise Be prepared to listen/accept their ideas.	Remain objective. Try not to score points.	Immediate feedback after presentation. Gelling of team.
Potential clients	1-8 May be to individuals or a board/team.	Key factor: present benefits to your clients. Requires planning and knowledge of their requirements.	Research clients' needs/style, etc. Pay attention to your image.	New orders. No response. Negative response.
Actual clients	1-4 Probably representatives already known to yourself.	Key factors: avoid complacency/over-familiarity. Present benefits.	Don't waste time with too much idle chatter. Make your presentation a discussion/consideration.	Valuable market research. Increased/decreased sales.
Staff development	1 to entire workforce. Could be individual requirements, small team or induction.	Avoid superiority. Be calm, concise and clear. Review presentation.	Have identified objectives which can be evaluated later.	Implementation of new processes/systems.
Company conference	At least 50 people (we hope). Most likely in conjunction with other speakers.	Team-building skills. Team-members skills. Co-ordinated approach.	Working in a team as a member of your organisation.	Increased sales/promotional activity.
Invited speaker (expert)	Most likely to be at least 10 people. Confers status of expert.	Know what you are talking about and who the audience are.	Avoid unnecessary jargon.	Further requests.

Figure 4.2: Requirements of different types of presentation

The 6 Ps of Presentations

(a)   Planning

Being well prepared for a presentation affects how the audience perceives you and your organisation, and how confident you feel about your presentation. It will result in your using any technical equipment more effectively and in your being able to react quickly and accurately to any questions posed by the audience. Presenters who apparently "think on their feet" and engage in an almost social interaction with their audience, usually do so as a result of very careful and detailed planning.

So, what are the elements of a presentation which you are giving that require planning?

- *Background*

    You will need to know the location, the timing, the running order, and the **position** from which you will be presenting (e.g. on a stage, in a meeting room, etc.). What technical equipment will be available to you? Who will be co-ordinating the presentation should you require additional assistance? Who are the other presenters? What are their subjects? Who are their audience? Why and how have they been selected? What is your role, status and what is expected of you in this context?

- *Personal Preparation*

    Is it necessary to adopt a particular dress code?

    Are you physically prepared with relevant data as well as spare pens, etc.?

    Do you need to rehearse in the chosen location to maximise your impact and to feel comfortable with your surroundings?

- *The Presentation Itself*

    Does your argument follow a logical sequence?

    Is the language clear enough and appropriate for your audience?

    Have you researched all your data/information thoroughly? Are your "facts" facts or fiction?

    Have you timed the length of your presentation?

    Will your presentation be lively and varied or delivered in a dull monotone?

    Will you make reference to the audience? (Ask questions, allow questions.)

    Do you understand what you are presenting?

    Have you considered all the potential implications or perceptions that there may be to your material? This will ensure that you can respond to any criticism or query adequately as opposed to defensively.

    Are any visual aids produced easily visible, relevant and properly produced?

    Check who will be available to offer technical support if necessary.

The planning should allow you to take control of your presentation. In fact, you can even set the scene by preparing information about yourself and your presentation, with which the co-ordinator can introduce you.

(b)   Purpose

The first element of the planning stage is concerned with identifying the purpose of the presentation being given and your role in fulfilling that purpose.

Clearly the purpose varies from presentation to presentation, but some presentations are for the benefit of internal audiences, and others for external audiences. In every case they are a medium for corporate strategy, objectives or ideas to be revealed, discussed and communicated (see Figure 4.3).

Type of Presentation	Purpose
Product launch	Communicate to external market; generate sales.
Job interview	Illustrate empathy and understanding of corporate objectives.
Exhibition stand	Raise awareness; communicate to external market; generate sales.
To senior managers	Generate support for an idea/proposal; test market an idea; establish presenter as the expert.
To colleagues	Share ideas/proposals; establish team hierarchy.
"Pitch" to potential clients	Communicate corporate ethos and attitudes to external market with the objective of making future sales.

Figure 4.3

(c)   Political Sensitivity

Why political sensitivity? Quite simply, presenters need to be aware of the potential impact and ramifications of the **content** of their presentations. Some issues are of political sensitivity in the largest sense (e.g. nuclear waste, closing hospitals or schools). In other instances there could be internal politics which need to be considered (e.g. reallocating workloads from one department to another). There include:

- Political presentations which represent local or national politics (e.g. party conferences, union meetings, local government meetings).

- Presentations which are politically sensitive and need to take account of legislation or political change in the external sense (e.g. new processes for food production, chemical emissions, education).

- Presentations which in their planning and execution need to reflect sensitivity to internal political issues.

(d)   Personal Commitment

If a presenter has no interest in the planning, writing or presenting of the material then the presentation will be a disaster.

However, too great a commitment to the subject matter may result in an inability to see the potential pitfalls or problems, and cause the presentation to be seen as overzealous and of the preaching type.

Too great a personal involvement in the presentation and your role can result in an excess of nerves and overplanning which destroys the impact of the presentation.

Your commitment should be to extensive and relevant preparation, professional delivery and your own sanity!

(e)   Personal Communication Skills

It is extremely important to be able to establish a rapport with your audience and fellow presenters. Obviously you can't retain eye contact with a hundred people, but you can make sure that your physical appearance, body language and style of presentation contribute to, rather than detract from, what you are trying to communicate.

The following tips may come in useful:

- Wear clothes which are smart (and clean) in which you feel comfortable. Avoid being fussily dressed or too formal.

- Try to control your nerves and the general nervous "tics" which we all have – fiddling with pens, scratching, etc.

- Use the space you have available to you; move around it so that the audience have to follow you and stay attentive.

- Look directly at your audience, not at your notes, the floor or the ceiling. This is actually easier with a large audience. As before, if you are not comfortable looking people in the eye, look at the space between their eyebrows. This gives the appearance that you are looking directly at them.

(f)   Polish

This is the most difficult element to achieve; it rarely comes naturally and is usually a result of practice, rehearsal and experience. A truly polished presenter can attain professionalism with friendliness. Don't mistake being polished for being slick or over-rehearsed. (*"It sounds like he's said this a million times before."*)

Even if you have to give the same information to a variety of audiences, vary your presentation. Remember to present the identified benefits to each particular audience. Avoid clumsy phrasing, jargon or rambling.

It's worth looking at news bulletins to see how professional presenters use their material and respond to the unexpected. Live morning shows are an even greater test of presenters and reflect polish to varying degrees.

Knowing Your Audience

As indicated above, you also need to consider your audience carefully. As with all methods of communication, you need to start from the point at which the audience is "at". You will find it helpful to ask yourself the following questions:

- **Who** will make up the audience? Are you addressing a group of directors or senior managers, or a group of work colleagues?

- **How big** will the audience be?

- What is the level of their **existing knowledge and awareness** of the subject?

- At what level can you **pitch the complexity** of your presentation?

● What is the **likely reaction** to the presentation? Is it likely that there will be anxiety or resistance to the subject matter, and can you get any ideas about the reasons for this?

● What are their **own objectives** for the session likely to be?

Whilst the needs of the audience should not be allowed to dictate your overall aims, they will almost certainly influence the specific objectives and the way in which the presentation will be delivered.

So how do you set about finding out this information?

Much of it can be obtained from careful consideration of the attendance list which is usually produced for a formal event, such as a training programme. This will certainly give an indication of the size of the audience and probably information about their background and experience. There may also be information about the audience's individual objectives in attending.

You should also consider past events of a similar nature. For example, finding out about a particular committee or how the last such presentation went.

Finally, we can reiterate the maxim of putting yourself in the audience's shoes. Once you have some sort of profile of the possible audience, think about it from their point of view. What will they be looking for and what will grab their attention?

Subject Knowledge

In oral communication generally, it is essential to "know your stuff " – you can't look it up as you go along. It all has to be at your fingertips – or more precisely, perhaps, on the tip of your tongue.

This means that you have to thoroughly research the topic and gather as much information as possible about it. Whilst you obviously need to focus on that which is directly relevant to your objectives, it is good to get as wide a perspective about the subject as possible. This will help you to deal with additional issues or alternative approaches which your audience might raise in questions. Make sure, too, that your information is up-to-date.

To a large extent, this is the same as any information gathering exercise. However, there are certain aspects which are of particular relevance to presentations, as opposed to other forms of communication.

● **Exemplification**

It is always helpful to illustrate the points you make by providing examples, but during presentations, examples provide a welcome opportunity to add life and colour to what may be a dull subject. Any exemplification needs to be carefully researched and developed to ensure it is accurate, relevant and supportive of your main themes.

Depending on the type of presentation, the examples may need to be more or less detailed. In some instances – such as an introduction to a new accounting system – you would need to provide detailed, worked-through practical examples. If there are not appropriate real examples to draw upon, it may be necessary to develop your own simulations. In other situations, perhaps during a speech about company recycling policy and practice to a local school, you would want to include some general facts and figures.

Anecdotes – short stories –about real incidents are also particularly helpful in illustrating practical implications or applications. Putting a humorous slant on these can be very effective in adding life and colour to the presentation.

Depending on the type of presentation, it may also be appropriate to involve the audience in some way by getting them to contribute information or examples from their own experience.

You need to be very clear about the type of information you want them to contribute and how you will use it. (We shall return to the issue of getting audience input and participation below.)

● **Exercises**

If the presentation you are involved in deals with skills development, it is likely that you will want to include some practical work – in the way of exercises – for the participants in the session. For example, this would be the case with the introduction to a new accounting system, where it would be important to give the audience some practical experience in trying out the procedures being introduced.

Any such exercises that are used need to be carefully worked out in advance. They should be relatively simple so that participants can understand what is involved straightaway, and you, as the presenter, can easily explain what is required. They must also be absolutely correct and capable of being completed in the time available.

Structuring Your Material

If you have done your research thoroughly, you will undoubtedly have far too much material to include in the presentation itself. You need, then, to organise that material:

● determining what should be used, such that you are able to cover all the objectives in the time available; and

● structuring the session and the material so that the audience may be effectively led through it in a way which enables them to meet the stated objectives.

One approach to organising a mass of material is to consider it under three categories:
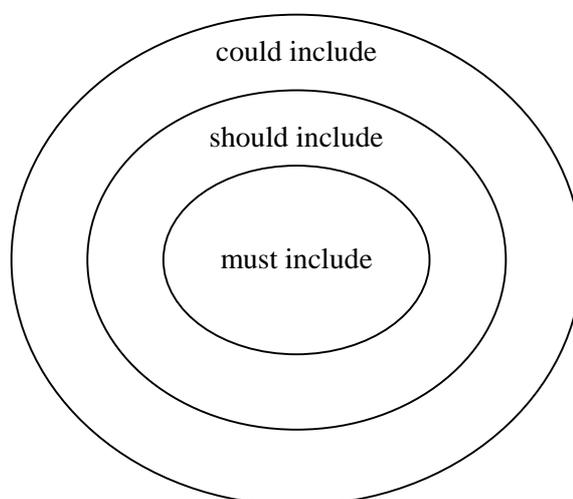
This concentrates attention on those key elements which **must** be included – those that are central to meeting the objectives and will, therefore, form the core of the presentation. Anything else is supplementary to the main points. This may be divided into those elements which should or could be included:

● material that *should* be included is that which is supportive of your main points – important material, but not essential and could be omitted without detracting from the exposition, if there is not sufficient time;

● material that *could* be included is that which extends your central material into further areas, not central to the main theme of the presentation. If there were unlimited time, it would be

good to include and it would add to the sum of information relevant to the objectives. However, the objectives can be met without it.

The point of this exercise is to focus on the core. It is this core – not the supplementary material – which needs to be organised to give the **structure** to the presentation, and this is far easier when you have stripped the content down to the essentials. It is important not to let detail get in the way of the overall structure.

It is better to have a well-rounded argument based around the core points of a presentation than to try to include too much of the supporting detail.

Structuring, then, is the process of determining the main headings and sub-headings within the core. Do not have too many main headings or the overall focus of the presentation will become dissipated – but at the same time, do not have so few that each area is too large to have a clear focus of its own.

In doing this, you need to think carefully about the **order** in which you wish to present your points. The aim is to develop the presentation in a logical fashion, starting from the basics and developing complexity as you work through it. This ensures a coherent progression to the whole, and helps to make your arguments persuasive. Your starting point is always where your audience is now (or at least where you assume them to be) and you can work from there, carrying them with you step-by-step through the various elements you need to cover.

Structuring the presentation to work, step-by-step, through your subject, also helps to divide the session into a number of "chunks" and provides natural break points. These allow both you and your audience periodically to take stock of progress through the subject, and make it easier for you to keep track of where you are.

Making and Using Notes

Very few speakers are able to remember everything they need to say at the time. You will need, therefore, to have some notes to help you remember all your points and to guide you through them in the correct order during the presentation. When we say "notes", we mean notes – you do **not** need to produce a full script for the presentation. There may be a temptation to write it all out verbatim, but this will only encourage you to read the words out to your audience, rather than speak to them.

It is best to use **cue cards**, rather than sheaves of paper. These are small cards which simply state the key points to be covered – main and sub-headings, with a number of subsidiary points underneath. Cards have the advantage of being small and easily handled, they do not rustle if you are nervous and can be easily bound together to keep them in order.

The words on the cue cards need to written clearly and boldly so that they can be easily read while you are standing up and speaking. The cards should be numbered to keep them in order and to help you know where you are during the presentation. They can also be usefully annotated to show where you will use any visual aids. Colour coding can be used to clearly identify different elements or to separate topics.

Practice

This is the final part of your preparation, but should never be omitted. There is no substitute for rehearsal – it is essential if you are to be in control of your content and confident about the timing, pace, fluency, etc. of its delivery.

Try to make this rehearsal as "real" as possible. Use your cue cards and incorporate the visual aids, just as if you were doing the presentation for real. If at all possible, carry out your trial in front of a "tame" audience, but even talking out loud to yourself will be of help. It is very likely that you will

want to make some minor changes once you have tried things out, so adjust the order or amend your cue cards as you go along. You can also check out exactly how fluently the use of your visual aids fits into the presentation, and make changes if necessary.

Structuring the Presentation

We discussed above the need to organise and structure your material into a coherent and manageable order. You also need to bear in mind the essential structure of the presentation itself.

Just as with any form of communication, a presentation should have three clearly identifiable parts – a beginning, a middle and an end. In terms of a formal presentation, these serve particular purposes.

- **Beginning**

    The purpose of any introduction is to tell your audience about what you are going to cover. It is no different in a formal presentation. Outline what you are going to say and, importantly, how you are going to present it. Tell them how you intend to handle questions (see below) and what use will be made of visual aids – especially the availability of handouts and the introduction of any videos. The more your audience know what to expect, the better they will be able to follow your presentation and relate to the subject matter.

    You also need to introduce yourself (and sometimes, where the audience is a small group, to get them to introduce themselves).

    However, there is an important additional purpose served by the introduction to a formal presentation. This is to gain your audience's attention and establish a rapport which will carry you through the rest of what you have to say. You set the tone of the session by what you say in the first few minutes, so the keynote has to be **interest**. This is generated by what you say *and* how you say it – so, make it light, introduce some humour if possible (for example, by using amusing anecdotes), and be positive.

- **Middle**

    This is the main body of the presentation, where you get down to the meat of what you want to say and work through all your material. As we noted above, it should take your audience through the topic(s) in a logical order, linking together similar aspects of subject matter and providing appropriate exemplification. It is useful to include brief summaries from time to time to allow you and your audience to take stock and ensure that you are carrying them with you as you develop your themes.

- **End**

    The conclusion of the presentation must be equally as positive as the introduction. The final impression you make on the audience is often the one which they will carry away with them, so make sure it is not weak.

    You need to summarise what you have covered in a succinct and interesting way. Again, this can be helped if you can introduce a touch of humour. If you shared the session's objectives with the audience as part of the introduction, you can return to them as the basis for the summary. You should also close with a distinct final statement, so that the audience is aware that you have definitely finished. This helps to prevent any tailing off and ensures that the ending is positive.

Tone and Style

Most forms of presentation are not about delivering a formal, impersonal speech to an audience. They are, essentially, an interaction between you as the presenter and the audience. There may, or may not,

be a degree of active participation (see below) by the audience, but try to think of it as a conversation, albeit with a (possibly) large group of people and essentially one-way. Talk to them, rather than lecture at them.

It is important to think about your audience in establishing the tone and style of speech that is appropriate. The key elements are the size of the audience, the degree of formality required for the occasion, and the size, layout and acoustics of the room. You need to speak clearly and avoid rushing things. If you have planned it correctly, you should have time to make all your points without steaming through it so fast that the audience has difficulty following either the arguments or the speech itself. Often, nerves will tend to make you speak faster than normal, so be quite deliberate in adjusting to an appropriate pace. The larger the audience, the more difficult it will be for those furthest away from you to hear, so speak with these people in mind.

If you are using visual aids, allow your audience time to assimilate them. Don't introduce key points whilst they are studying one of your highly attractive OHP transparencies. Talk them through anything that you show them, as well as using it as a reference point to develop further your argument.

Non-verbal Communication

Body language is very important in delivering presentations, as this conditions the rapport you establish with the audience. You need to adopt an open stance and style which engages with the audience, rather than distances you from them. You also need, as far as nerves may permit, to be as natural as possible.

Depending on the particular situation (formality, size of audience, size of room, etc.), you may be able to make a decision about whether you should stand or sit to make your presentation. Whichever way you do it, do not hide yourself away behind a desk or lectern, or feel that you have to retain the same stance and remain motionless throughout the session – a certain amount of movement will be more natural. For example, if you are using a lectern, it is quite acceptable to move away from it, and indeed, such movement may help to engage the audience.

If you are the sort of person who would naturally use your hands as you express yourself, feel free to do so, but beware of over-expansive gestures, as this will detract from what you are saying.

It is important to maintain eye contact with the audience as a whole. This helps to show interest in, and engagement with, your audience. Let your eyes move over the audience and avoid fixing your gaze on one particular individual. This is where you will see the importance of using only cue cards rather than a full script – you will be able to glance at your notes without losing the impact of eye contact.

Eye contact is also important because you should all the time be watching for feedback from the audience, and assessing people's level of concentration. Try to vary the intensity of your delivery to take into account the need for individuals to refocus.

In using any visual aids, it is important to remember that you need to maintain contact with your audience as you write. Do not turn your back for too long, and never speak without turning to face the front.

Participation

The final point in considering the delivery of a presentation lies in respect of the way in which you interact with the audience. Oral communication is essentially a two-way process, and although in a presentation you will have a lot of one-way presenting of information to do, do not lose track of the need for some degree of participation.

At the least, you need to consider how you deal with questions. There are, basically, two alternatives:

- leave them until the end, when you can set some time aside for them – which provides you with more control over the running of the session, but can be very uninvolving for the audience at the time; or

- take them as you go along – which has the advantage of resolving any issues at the time they arise, but can be difficult to handle as it may throw out your timing or disrupt your planned order of dealing with topics. This method allows for a higher degree of audience involvement and works best with smaller, less formal groups. However, even in larger, formal presentations, it is best to allow some degree of questioning on points as they arise, but do not be afraid to cut short discussion and defer consideration of particular points to a later stage of the presentation or the end.

Whichever method you use, you need to take control over it and explicitly state the way in which you intend to handle questions in your introduction.

Allied to this is the question of allowing for audience response and feedback to what you have to say. Depending on the type of presentation, it is quite possible that people will want to discuss issues you raise. Again, you may want these to be aired as they arise and encourage participation and involvement from your audience. However, in anything more than small, informal groups, this can be very hard to control. Remember that you have a presentation to give, not a discussion group to run! The best time for discussion is at the end, when you done your bit and can allow time for the audience to make their contribution.

Do not, though, ignore your audience. Very often, they can make a valuable contribution to the development of your presentation by providing examples from their own experience and contributing their own ideas. Obtaining their input at certain points is a useful device for involving them, as well as bringing in real issues of concern to them. Thus, in developing a list of, say, safety problems encountered at the workplace, you could usefully solicit examples from your audience, rather than just presenting your own.

In doing this, you need to ensure that you can keep control over what is said. It is easy to get deflected from the central line of your presentation by the issues that may be raised. You need, therefore, to know the types of responses you want to get, so that you can classify the actual responses to fit in with the way you want to develop your argument. It is important, then, that you are prepared for such an aspect to your presentation. Just because you are going to get the audience to contribute something, doesn't mean that you don't have to plan for it.

It is helpful to record the responses you get by writing them onto a flipchart or marker board. In doing so, you can respond yourself to the input and perhaps put the specific instance raised into a classification which suits you. (Remember, whenever you write anything up during the course of the presentation, that you have to write legibly and in large letters!).

C.   USING THE TELEPHONE

Purpose of Telephone Calls

There is no area of business that is not affected by the use of the telephone. Using the telephone as an effective communication tool requires an understanding of the purpose of the communication and the effect that telephone communications can have on your audience. The postman may ring twice, but your customers or colleagues may only ring once.

Using the telephone effectively can result in:

●   An increase the level of personal contact and the development of ongoing "live" relationships – both internally and externally, crucially with customers/clients.

●   Immediate response to issues – which may be particularly important in maintaining good customer relations.

●   Improved information flow within and around your organisation.

●   A reduction in time spent writing letters (and awaiting responses) and consequent reduction in administrative costs.

●   An enhanced total quality performance of your business.

Figure 4.3 illustrates the range of business telephone calls within an organisation and how the telephone can provide real customer and business support.

Telephone activity	Benefits to organisation/audience
Desk research	Identify who to contact in a specific organisation. Must have clear purpose.
Telemarketing	Identify potential markets for goods/services.
List cleaning	Updating databases. Check names, status and addresses of contacts.
Direct mail	Follow-up call reinforces message. Additional market research opportunity.
Issuing invitations to customer events	More likely to gain commitment. Recipient of call will check diary. Letters may be filed or destroyed.
Questionnaires	If brief and purposeful, useful information can be gained.
Prospecting	Allows initial research. Establishes profile and referral process.
Appointment making	Give outline as to proposal to be discussed; give alternative dates and times. Allows recipient to feel in control.
Customer care calls	Most effective if timed correctly. 9-9.30 a.m. and 2.30-4 p.m. are often bad times for clients working from home.
Account management	Saves client money as call cost borne by you rather than lengthy written correspondence.
Renewing business contacts	Re-establishes your position.
Selling	Requires efficient support systems to deal with further enquiries, sales and after sales.
Order taking	Tell (sell) what you have in stock, not what's unavailable.
Retrieving lost business	Re-establish client contact. Client may feel more important as a result of this selection.
Handling enquiries	Key is to stay calm, listen carefully and respond quickly to enquiries. Follow up referrals.
Dealing with complaints Invoice queries Credit control	Establish the facts. Ensures that there is a sense that an individual, not an organisation, is concerned.
Internal calls	May be more informal but a lot of important information exchanges can be made.
External calls – customers and suppliers	More effective if you ring at a time which suits **them** and when you have all relevant data and questions.
After-sales service/follow-up calls	Prospects for future business. Helps achieve client loyalty.

Figure 4.3

Successful Calls

Listening is the key to a successful telephone call. People who communicate well on the telephone are not easily distracted. They will listen attentively and let the caller know that they are listening by utilising phrases like *"Yes, I see", "I understand"*. This kind of feedback is extremely important in using the telephone since there are no visual clues between the participants as to how the interaction is going. (Have you ever had the experience that there was suddenly no one on the other end of the line – *"are you still there"?)*

Speaking clearly and calmly is far more important than worrying about an accent or having to use a "telephone voice". Telephones are in the majority of homes and nearly all businesses (it is hard to imagine a business which doesn't use a phone), and most people are used to using the telephone socially. In the business context there is no need to adopt a new persona and voice but you should be clear as to the purpose of the call, who you are talking to and what the desired outcome may be.

Business telephone calls often appear casual or informal but will take place within the context of a need to share, impart or acquire knowledge or information. Remember that every time you answer the telephone or make a call, you should be representing the organisation to its fullest advantage.

Telephone calls, like all business communications, must be purposeful. Callers must have a clear idea as to:

(a)   Who their audience is.

(b)   The nature of the organisation they are contacting.

(c)   What information to convey.

(d)   What questions to ask to elicit desired responses.

(e)   What action to take as a result of the call.

Making notes prior to and during calls is a useful way of ensuring that you cover and remember the salient points. Remember that your attitude to the audience or client is reflected in:

●   Your tone of voice.

●   The type of language you use.

●   The clarity with which you express your ideas.

●   How attentively you listen to their responses.

●   Your confidence and enthusiasm.

It is possible to write a successful business communication, however "bloody" you feel towards the recipient. It is **not** possible to make a successful telephone call if:

●   You are unsure of the purpose of the call.

●   You don't know who to contact.

●   You can't be bothered. (*"I'm so busy. I just managed to fit you in today."*)

●   You feel anger towards the person you will be contacting

●   You are unprepared.

"Smile when you dial" is more effective than to *"groan on the phone"*.

Telephone Technique

An effective telephone call is one when you've sent your message to the audience, received appropriate feedback and are able to take action. Even complaints can be positive and allow for more efficiency in services provided. You must welcome calls and callers whatever the circumstances.

The following guidelines will aid towards all your calls being positive communications:

(a)   Introduce yourself and be introduced to your caller (the verbal handshake).

(b)   Explain why you are calling.

(c)   Indicate what you expect to gain from the call.

(d)   Use open-ended questions to elicit information and to gain the confidence of the person you are speaking to.

(e)   Respond to any information you receive.

(f)   Always reflect the organisation you represent favourably in your own attitude and commitment, even when dealing with a complaint or difficult negotiation. Whatever your personal views on a matter, be consistent with company procedures or views. It may seem friendly to agree with a client, but it actually makes you seem disloyal and your organisation characterised by fragmentation and lack of teamwork.

(g)   Acknowledge that you are still there if listening for a longish period of time.

(h)   Gain agreement or consensus as to what has been said, agreed and what future action to take.

(j)   Check that you have both drawn the same conclusions.

(k)   Offer alternative options.

(l)   Close by thanking the person for his or her time and state that you look forward to speaking to him or her again soon.

Every call made from your organisation says as much about your company as any other area of activity can do.

Using Answerphones to Your Advantage

Answerphones allow organisations to get on with their business without interruption at key moments, mean that there is always a voice at the other end of the phone, and allow for 24-hour communication worldwide.

They are at their most effective as a communications medium if:

(a)   The answerphone message is clear, announces the name of the company or individual, and repeats the telephone number so that the caller is certain that he or she has rung the right number.

(b)   The answerphone message requests name, company name, message or date and time called (unless digitally recorded) from the caller.

(c)   Messages are responded to quickly and appropriately.

(d)   Instructions as to when to leave the message are given (after the long or short tone).

The caller must be able to leave his or her details clearly and suggest an appropriate time for a return call.

It is better to hang up before leaving a message if you feel unable to do so clearly, than to leave a bumbling, incoherent one. The most confident telephone callers can be caught out by answerphones – be prepared, have notes as to the purpose of your call and leave a clear, concise message.

Message Taking

If you answer a telephone call and take a message for someone else you **must** note down certain important details:

- The name of the person the caller wanted to speak to

- Name, organisation, telephone number and possibly address of the caller

- The day, date and time

- The name of the person who took the message

- The message and any action needed, e.g. call back urgently

Study Unit 5

Visual Communication

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INTRODUCTION

The written or spoken word are just one means of communication, albeit the most important. On their own, though, they can tend to be somewhat boring – too many pages of text to wade through, listening to a speaker for too long, etc. can turn off the best recipient no matter how good the form of presentation. One way of alleviating this is the use of visual or graphical effects within reports, booklets, manuals, information brochures and oral presentations.

We start by following up our examination of presentations and presentational skills by looking at the role of audio and visual aids. In many forms of face to face interaction, it is very helpful to use visual displays to assist in getting your message across – for example, jotting down a diagram to help explain the way a system works to a colleague. The same principle applies in presentations, except that the way in which such visual aids are used needs to be carefully integrated with the rest of the presentation. Here, then, we shall examine the nature and purpose of audio and visual aids, and how you can use them to enhance the giving of a presentation.

Our second area of study here is the presentation of statistical information. Figures on their own – particularly lengthy tables – convey little to the average eye, and it is usually very difficult to pick out the important relationships between various items without a thorough examination of the figures. Graphs, bar charts, pie charts, etc. present the information in a more accessible form, enabling the whole range of the subject and particular relationships to be seen at a glance. We shall, then examine the way in which such visual representations can be used to draw attention to the key points.

Finally, we shall consider issues of design in general and of its application to the corporate image which companies project in particular. Good design is essential in today's competitive business environment, as the expectations of the public are now very high in this respect. We shall, then, review the contribution of design to good business communications and examine some of the many vehicles for conveying corporate image.

A.   NATURE AND PURPOSE OF AUDIO AND VISUAL AIDS

This study unit is concerned with the effective use of audio and visual aids. Although such aids can greatly enhance a presentation, not every presentation will need them or be more effective because of them. Using audio and visual aids in order to appear more professional but without reflecting the purpose of the presentation is time-wasting, costly and can make you appear more concerned with the trivia rather than the detail of your presentation. They can also detract from, rather than enhance, your performance – unless they are well produced and relevant, they are a waste of everyone's time. The more sophisticated the technology, the worse the disaster if anything goes wrong.

So, what is the point of using audio and visual aids at all? (Note that we need to include the effective use of audio – the notion that we only use visual aids in a presentation is incorrect.)

Appropriate audio or visual aids, if used selectively (with regard to timing, format, complexity) and designed to a standard expected of the presentation, can enhance a good presentation and increase its effectiveness through:

- creating awareness;

- encouraging interest;

- retaining involvement;

- achieving instant results/responses;

- describing in one image an entire proposal or concept;

- being memorable;

- complementing the spoken word;

- reinforcing corporate identity.

If you are planning a presentation, you need to ask yourself:

(a)   Would this presentation be improved by using audio-visual aids?

(b)   What would be the most appropriate format?

Do **not** ask yourself "*What audio-visual aids shall I use?*". The difference is a subtle one but the message is clear. Only use audio-visual aids if they will enhance your presentation and are appropriate.

If, after appropriate consideration, you do decide to use them to make more effective presentations, then you must determine:

- The range of audio-visual aids available and their advantages and disadvantages.

- How to design audio-visual aids.

- How to make the best use of all audio-visual aids at your disposal.

These are the key issues with which we shall be concerned in the rest of this unit.

What Are Audio-Visual Aids?

Quite simply, visual aids are those items which make use of pictures or visual images (including the written word) in support of an oral presentation. We also need to include audio aids because, increasingly, music or sound effects can be used to add impact to a presentation, and some (such as video) combine visual and audio.

The range of AVAs available is illustrated in Figure 5.1.
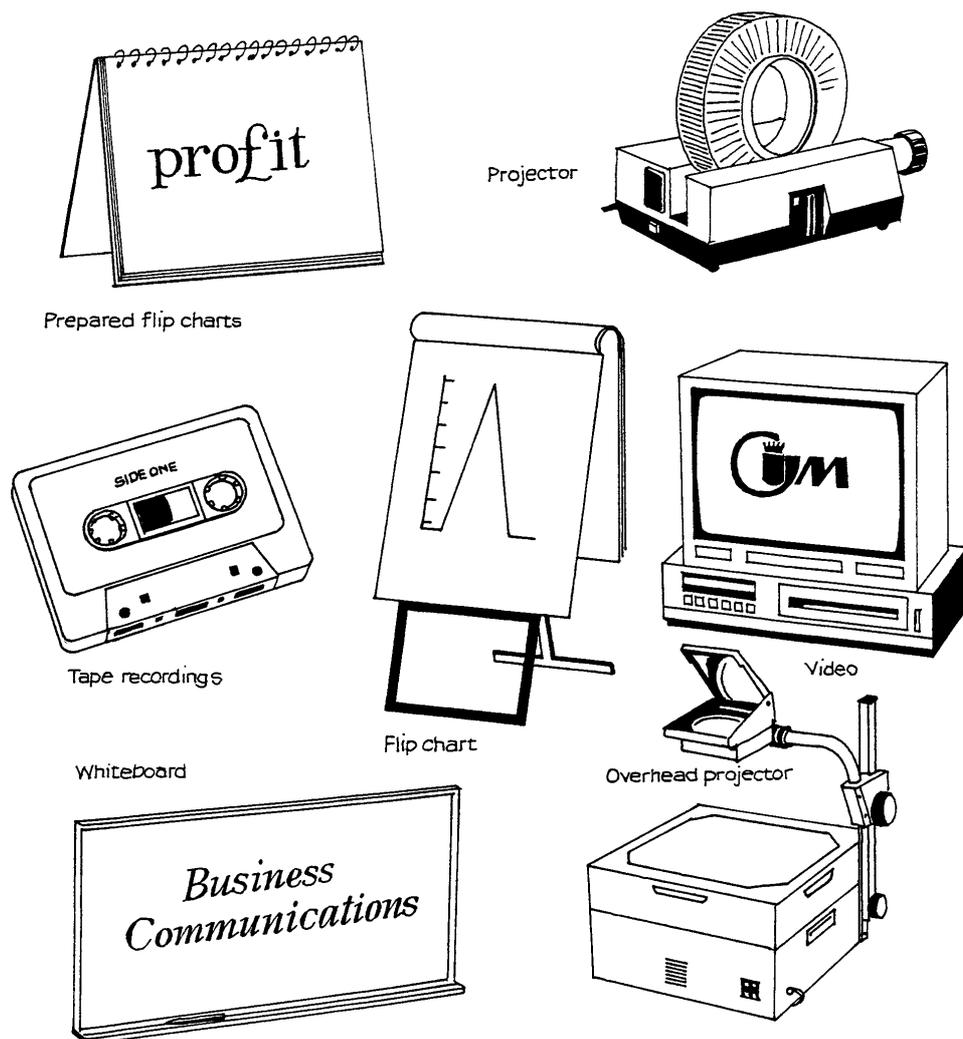
Figure 5.1: Audio-Visual Aids

Using Audio-Visual Aids Effectively

Before deciding to use audio-visual aids as part of a presentation, you need to be certain that they will:

●   Enhance the presentation.

●   Not detract from its effectiveness.

●   Be professionally produced and presented.

One of the best reasons for **not** using audio-visual aids is a lack of confidence in using them. In every instance you need to be familiar with the equipment you are going to use and to have a fall-back position if the unexpected (like a power cut) should happen. Remember that audio-visual aids support and enhance presentations. Presentations are not showcases for the most technically advanced or best produced audio-visuals.

Never forget that you have included audio-visuals in your presentation for the benefit of your audience. It does not matter what type of audio-visual you use, the following criteria must be met:

- Language or images are selected which reflect the nature of the presentation and represent a dimension of the subject under discussion/being presented.

- Care is taken not to use offensive images, phrases or music. (Do semi-clothed people actually sell cars?)

- The seating arrangements/room layouts are designed (and double-checked by you) so that everyone can hear or see what's going on.

- There is sufficient technical back-up.

- You do not use effects which could upset your audience (e.g. loud bangs, flickering lights, strobe lights, fireworks) or even endanger them.

- You opt for simplicity and clarity rather than complexity and confusion.

- Always make reference to a visual.

- Don't turn away from the audience to operate audio-visuals; either use technical support or arrange for your and the audience's convenience.

- Try not to obscure visuals by standing in front of them.

- To keep attention, use audio-visuals at low attention periods such as after lunch, before a break or towards the end of a session.

- Rehearse.

Figure 5.2 provides more details about the effective use of particular aids.

Type of Audio-Visual	Using Them Effectively	Additional Requirements
Prepared flip charts	Usually too small for a large audience. Very useful in small internal presentations, including interview presentations.	Need to be clearly written. Useful for cartoon-like illustrations. Use non-smudge pens.
Flip chart	Particularly useful in seminar-type presentations. Be careful not to obscure what you are writing.	Sufficient paper; non-smudge, bright-coloured working felt-tip pens. Can refer to previous sheets.
Whiteboards	Best in teaching situation. Information has to be constantly erased. Need clear, straight handwriting.	Similar to blackboards. Only really useful in small training sessions.
Overhead projectors	Prepare transparencies in advance. Keep slides in order. Have back-up photocopies in the event of a disaster.	Check projector working. Check your slides fit projector and are right shape, otherwise you lose detail.
Projector	Assume this will go wrong. Prepare slides beforehand and check equipment.	Use hand-held remote-control model.
Build-up visuals	Need to be big enough to have an impact. Can create audience tension.	Need careful rehearsing or preplanning.
Physical objects	Must be visible and relevant. Attracts immediate attention.	If samples, you need sufficient for 1½ times your audience.
Working models	Can make or break a presentation. Test and retest. Good at exhibitions. Excellent for product launches.	Always have a "spare/one that I made earlier" if making a demonstration. Speaks for itself.
Tape recordings	Check equipment for adequate amplification. Best for music rather than speech unless in classroom.	Be interested in visual display. Don't distract by fiddling, moving off stage or making notes. Participate with the audience. Introduce video, etc. as to reason for showing it, summarise; invite comments.
Video	Well presented video is a presentation in itself. Try to keep it short and relevant. Check equipment.	
Film	Useful if you are presenting a new film or instead of video. Check equipment.	
Satellite link-up	Fraught with danger for the novice. See most news programmes.	You may find videoconferencing more effective for in-house presentations.

Figure 5.2: Effective use of selected audio-visual aids

B.   DESIGNING AUDIO-VISUAL AIDS

The reasons for using audio-visual aids are to:

- Illustrate the point/concept you are making/introducing.

- Reveal a product or image rather than describe it.

- Engage and/or retain the interest of your audience.

- Add variety to your presentation.

As we have said, there is little point in designing sophisticated audio-visual aids unless they have relevance to your presentation and add value to it. Note, too, that badly designed, although well planned and intentioned audio-visual aids, have a more negative impact than not using any audio-visual aids at all.

However, not everyone is a graphic designer, cartoonist, calligrapher, desk top publisher and layout specialist. In this section we will consider how best to design audio-visual aids using a variety of formats but always bearing in mind that it may be necessary to call in the experts to aid in production of the finished article.

The starting point that you need to be clear about is:

- The purpose of the presentation.

- The need for audio-visuals.

- The most appropriate audio-visuals for this presentation.

- How and when you plan to use the audio-visuals.

Using Words as Visuals

Clearly, many visual aids will include words – indeed, words will often be the dominant image on overhead projector (OHP) transparencies, slides and flip charts, etc. You will probably want to use them to summarise and highlight key words or phrases.

Whenever you use words in visual displays, always ensure that:

- the text is clear, straight and large enough to be read easily throughout the room;

- all words are spelt correctly

- lower and upper case letters have been used properly

- there is a clear margin around the edge of the whole display and that there is sufficient white space around the words to enable them to stand out clearly.

It is preferable not to use hand-written text on any pre-prepared displays (with the exception of flip charts which cannot be used in any other way), although obviously anything written on to a display during the course of the presentation will have to be hand-written. The same points as above apply.

Note, though, that the point of a presentation is not to engage in a communal reading session. You do not want your audience to be concentrating so much on assimilating the words that they do not follow what you are saying or miss the context in which the visuals are being introduced. Putting words up on display also makes people feel that they should be noting them down and you do not want this to occupy the audience at the expense of listening or engaging in a dialogue.

Overhead Projector Transparencies

OHPs project an image from a transparent sheet onto a wall or screen. The projection can be large or small, depending on the needs of the room size and audience, making them a very versatile aid in many different circumstances.

It is best not to include too much, or too complex, information on a transparency. You do not want your audience concentrating on reading large amounts of text on the screen, or trying to work out a statistical table, when they should be concentrating on what you are saying. They are, therefore, best used to display summaries – either as an introduction to a topic to show the structure of how you are going to work through it, or at the end as a précis of the main points covered. They can also be used to present summary information, such as simple charts or diagrams, or examples to illustrate the points you are making as you go along.

OHPs have the advantage that you can refer directly to the information being displayed – by pointing to items on the transparency itself – without having to turn away from the audience. You can also easily cover certain items on the sheet with a piece of paper so that, for example, a list of points can be revealed one by one – as shown in Figure 5.3.

Using AVAs	Using AVAs	Using AVAs	Using AVAs
● OHPs	● OHPs	● OHPs	● OHPs
	● Slides	● Slides	● Slides
		● Flip Charts	● Flip Charts
			● Videos
1	*2*	*3*	*4*
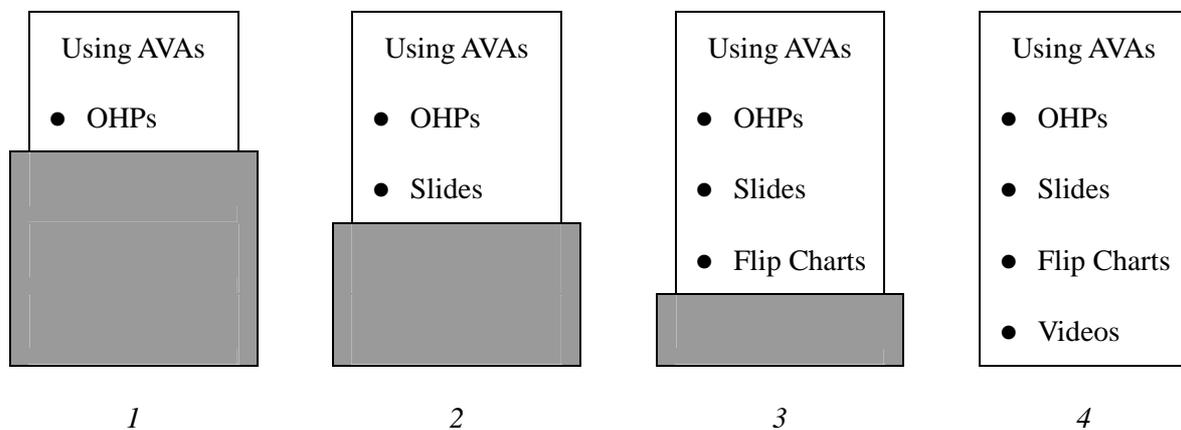
Figure 5.3: Revealing points one by one

Being able to prepare OHP transparencies in advance means that you can obtain a very professional looking finish. (This is in contrast to producing hand-written material during the presentation itself.) Materials may be produced on computer – either from word processing packages or specialist presentation packages – and printed directly on to transparencies to produce the best effect. Doing it this way may mean that colour can be used, depending on the printer available, and that particular styles can be consistently employed, perhaps including a company logo. However, even if you produce transparencies by hand, effective results can be obtained by neat, clear handwriting and use of different colours.

When using OHPs, ensure that the equipment is in working order and is correctly positioned – both for you to use and for your audience to see.

Slide Projectors

These are used mainly to display photographs, but other high definition images may be produced on film to be presented in this way. They are particularly useful for providing illustrations of real items or events – such as a new product or a location.

It is also possible to use tape/slide packages, with a recorded commentary alongside the slides. However, this can detract from the relationship you have with your audience, so should be used with care.

Again, if you are using slides, make sure the projector is in working order (and that you know how to use it!) and is correctly positioned. You also need to ensure that your slides are correctly mounted and in the right order.

Flip Charts

Flip charts are very useful in a small seminar, working group or brainstorming session, but present real problems of visibility in larger groups.

They can be used, in a pre-prepared fashion, in a similar way to OHPs – displaying a framework for the session (or parts of it), notes of key points, summaries, etc. – although you cannot reveal points one by one. However, they come into their own as a means of displaying points during a session, particularly those raised by participants during discussion, which can then be kept and returned to for be review.

In using flip charts, the same principles apply as above in respect of the use of text generally, and of handwriting in particular. In addition, you need to ensure the following:

●   that you have sufficient pens available, that they all work properly and do not dry out;

●   that there is a sufficient supply of paper;

●   that you do not obscure what you are writing;

●   that your writing is not too small, not that it trails off the page.

Also, beware the problem of having to keep cross-referencing to previous sheets which is time-consuming and confusing for your audience.

Whiteboards

Whiteboards are plain surface display boards on which you write using a special marker pen, as for flip charts. They may be wall mounted (as in some purpose built training rooms) or portable.

They are an alternative to flip charts in small presentations as a means of writing up key points during a presentation, although they cannot really be pre-prepared. There are, though, a number of drawbacks to them:

●   They need to be wiped clean when the board is full.

●   They cannot store material for reference as in flip charts, for example.

●   You must have clear, legible handwriting.

●   You need to check that pens and cleaning cloth are available and in working order.

●   If information is left for any time at all, it tends to distract.

●   They seem to establish a teacher-pupil relationship rather than a dialogue between presenter and audience.

Video

Videos are widely employed in training situations and are increasingly being used in other forms of presentations – particularly to show the active use of products or different aspects of situations/locations, or to introduce someone else's views in person, etc. There are very many

commercially available videos in most areas of training and it is relatively inexpensive to produce them oneself on specific topics, although producing in-house videos to the professional standard that most audiences will expect is not easy.

Videos can be very effective if used properly – but remember that they should be a **support** for your session, not a substitute for your own input. Thus you need to explain the relevance and purpose of the video before showing it and give some pointers for the audience to consider whilst viewing it.

You need to be thoroughly conversant with a video before using it – **exactly** how long it is, where the main points are which you want to emphasise, where you might want to break for discussion, etc.

There is a dilemma as to whether to pause a video for discussion or to discuss issues afterwards. If the video is short – up to 10 minutes – and raises questions, then it is probably easier to discuss afterwards. Try to avoid lengthy videos (anything over 20 minutes) unless you are in a training session. Even then, think very carefully as to why that particular video fits your aims and objectives and how you will draw your audience's attention to the salient points.

Audiences tend to accept videos readily, but are not always happy to discuss them afterwards, and there is sometimes a flat atmosphere. In addition, it is not a good idea to start a presentation with a video because the rest of the presentation may then not appear so exciting, polished or professional.

Once again, make sure the machine is in working order (and that you know how to use it!) and is correctly positioned. It is surprising how many times the equipment lets you down at the time when you need it to be functioning perfectly! Make sure you know how to operate the equipment and set volume, contrast, etc. in advance. Ensure that the screen is big enough for your audience to see the video and that the video has been professionally produced. If you want to show several clips, have them put on one tape and note the relevant tape section. Avoid using several tapes; you and your audience will only get confused.

Physical Objects

It may be very useful to display materials to your audience or present them with examples of relevant materials – samples of products, working models, presentation packs, etc. This is particularly appropriate at trade fairs and exhibitions, but also at many other types of presentation.

All materials you use in this way must be:

- Easy to control and present

- Relevant to the presentation

- Attention-grabbing

- Large enough to be seen by everyone

You need to be completely familiar with the products you are handling. If you use working models, check that they do actually work and have spares of everything just in case. In a demonstration, *"Here's one that I made earlier"* is a useful fall-back position.

Providing samples of products being presented can be very useful – the feel, smell and look of a product you are discussing say so much more than words describing its values and properties. At a small presentation you can hand out such samples, but at larger ones they are best included in a presentation pack.. These should not, generally, be distributed during the presentation, as this will distract attention from what you want to say, but can be provided either before – to be picked up by the audience as they arrive, or by putting them on seats – or after the session.

When handing out materials, do not push them into someone's hand or bag – make a gift of them, offer them up to your audience, and relinquish them slowly so that you can make eye contact with your audience at the same time.

Using Sound Effectively

In certain circumstances, sound effects may be used on their own to enhance a presentation. These include tape recordings, live musicians or actors, or even effects you introduce yourself.

Sound effects may be used to introduce examples of the sounds of products, contributions by other people (although video is better for this), etc. into the presentation itself, or to smooth the transition between sections of the presentation. The intrusion of external sounds into a presentation is likely to be quite dramatic and you need, therefore, to ensure that any such effects are fully integrated into the presentation. They must serve a purpose and that purpose must be made clear to the audience. Music is quite often used for the second purpose – transition – with dramatic themes used for introducing speakers or the unveiling of products, or suitably soothing music at the end or during a break.

You need to ensure that any technical issues are sorted out in advance – amplification is loud enough, but not too loud, for the audience, the quality is crystal clear (no hiss, scratches, etc. on recordings) – and that you have rehearsed any cues with the tape operator or live musicians as to when to come in.

One of the most effective ways of using sound in a presentation is to make use of the silences. Make each pause one of anticipation. It can be used as a sound effect – for example, *"Listen. Can you hear that? That's our new model XYZ. Silent as a lamb!"*

Another possibility is not speaking until everyone is seated in order to create an expectant hush.

Physical surroundings

Whilst not an audio-visual aid in itself, the physical surroundings in which a presentation takes place can have a dramatic effect upon its effectiveness. We can consider three such aspects.

(a)   Lighting

The most important factor to remember is to check how lighting affects the audience. Try to see your presentation from their perspective, not from your own position on the stage or podium. It may be comforting to feel that you can't see your audience, but from their perspective the whole presentation may be leaving them in the dark.

All visual aids need their light projected from the place that causes least shadow when they are in use. The lighting must be strong enough to produce a clear image. General lighting available in a small presentation will be sufficient. In a large or dramatic presentation, spot lighting, fading in and fading out, and coloured lighting might be used.

(b)   Décor

When choosing an external location for your presentation, décor will certainly be a factor. Internally it is more difficult to influence décor. Use company publications and brochures to create an area of interest which will divert attention from hideous curtains or carpets. Screens and curtains can be used to fence off unsightly areas.

(c)   Seating and layout

Seats should be functional and comfortable and in positions where the audience is able to see your presentation to its fullest advantage. If you want the audience to be able to write things down during the presentation – either making a lot of notes or carrying out written exercises – then you may want them to have desks or tables. If you want a lot of discussion, then a more informal layout and speaker position may be appropriate.

Some possible layouts for small presentations are shown in Figure 5.4.
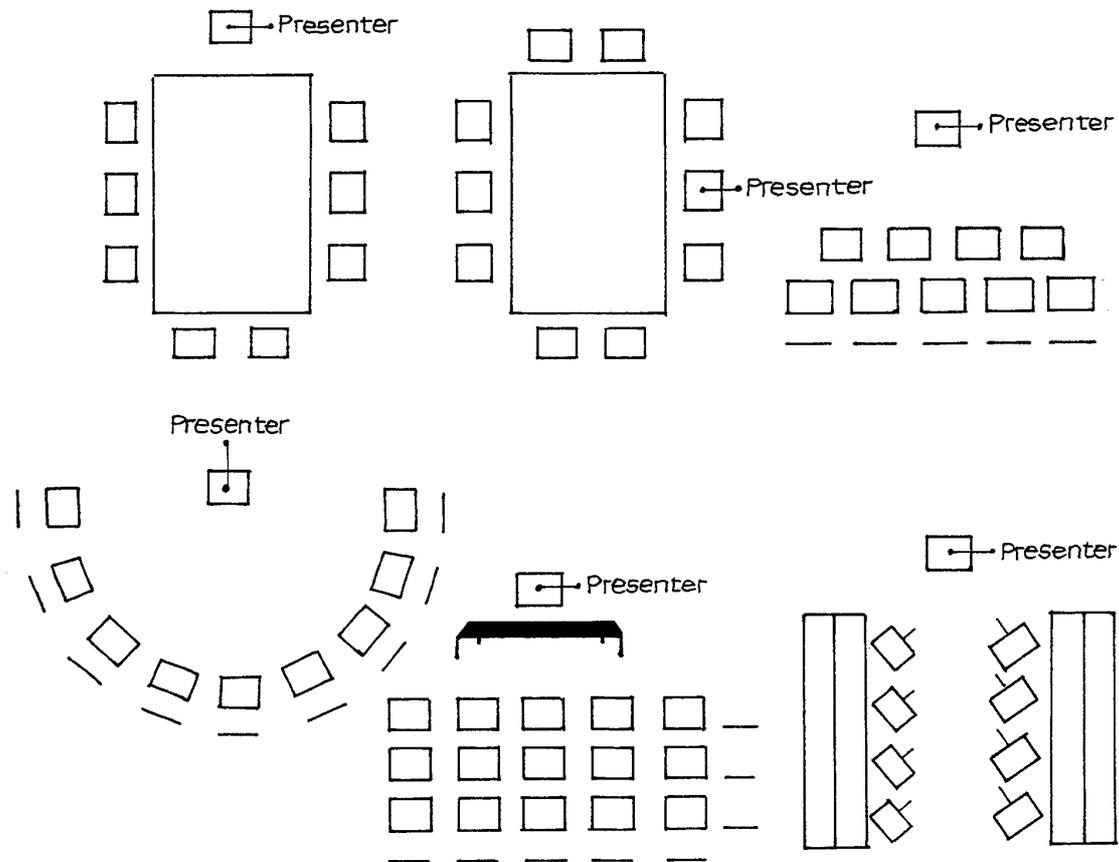
Figure 5.4: Layouts for small presentations

For large presentations, the presenter is likely to be on a stage of some sort – a raised platform, an actual stage or simply a separate area from the audience – facing the audience who will be seated in rows.

Tables are useful for presenters and audience alike to rest on, store materials or act as a barrier. How the presenter makes use of a table in a small presentation affects the audience response, as illustrated in Figure 5.5.

The key is for the presenter to use all the available space and to dominate. Being mobile, the presenter is a very effective visual aid him/herself and is in a good position to judge audience reactions and responses.

(i) Firmly ensconced behind desk, very authoritarian, may indicate lack of confidence and need for barrier to establish importance.

(ii) Table covered with materials, presenter mobile, confident in presentation, needs reassurance of materials, can appear too casual.

(iii) Presenter seated on desk, clearly at ease with presentation and audience. Not appropriate for very formal presentations. Some audiences find this intimidating as it is unexpected.

Figure 5.5: Presenter positions

C. PRESENTING STATISTICAL INFORMATION

Presenting statistical data in an effective visual way is an important and powerful skill in business communications, whether it is used in reports, presentations or meetings.

Whether you are dealing with a small or a large amount of data, it is always necessary to consider how you are going to present it. By choosing an appropriate method, you can demonstrate important features of the data and highlight significant patterns. By using different techniques of tabulation and presentation, you can transform raw data into meaningful information.

General Principles

Statistical information is the result of the analysis and manipulation of raw quantitative data to give it meaning. Invariably, that meaning is in terms of its value to decision makers, and as such it is not the statistics themselves which are important, but their interpretation. The key point, then, is that statistics on their own are not necessarily significant, but they are important as a support for other statements. Thus, statistical information should not be presented for its own sake, but should be used in relation to the points being made in the report or presentation.

As such, a number of general principles can be identified for the use and presentation of statistics:

● All statistical information needs to be set in a context which explains its relevance to the points being made.

● The amount of detail needs to be kept to the minimum necessary to support the arguments in the report/presentation.

● The source of the data must always be stated.

In relation to this last point, it is important to distinguish between primary and secondary data:

(a) Primary Data is where data is collected for the specific purpose under discussion, in which case, it will invariably be directly relevant;

(b) Secondary Data is where the data which has been collected for some purpose other than that for which it is now being used – in which case, it needs to be used with care and you need to ensure that it does actually provide the meaning you give it in the report/presentation.

Tables

Tabulation is an important element of visual or graphical enhancement – for statistical information or as a means of structuring text. The use of tables to summarise information in terms of relationships or under headings gains from the fact that, in tables, you do not need to use full sentences. The information is presented in truncated form and is likely to be more easily absorbed, although it is important to remember that this is a summary device and fuller discussion of the issue raised will probably be necessary elsewhere.

The value of numerical data may be increased many times by effective tabulation. Tabulation is the systematic arrangement of numerical data which has been collected, so that a reasoned account of its interpretation can be facilitated. It depends on a logical classification of the data into clearly defined groups, each with characteristics of its own (for example, customers by men or women, or by different age groups, etc.). The information is then set out clearly in the minimum space and with the minimum wording. The following rules should be observed in the preparation of statistical tables:

● each table should serve a single purpose – attempting to show more than one group of relationships in the same table tends to obscure the message;

● the table itself should have a title or caption, and each grouping of information must have a heading, all of which should be as short as possible and self-explanatory;

● tables should not contain figures with a large number of digits – rounding numbers is acceptable since a high degree of accuracy is not usually that important (it is the relationships which are), and expressing all figures in, say, thousands is better than writing them all out in full;

● the number of columns and headings should be kept to a minimum – a multiplicity of headings etc. prevents the proper emphasis being given to the key facts and tendencies shown by the table;

● units must always be stated (£,000's, age, etc.);

● figures showing relationships such as percentages, ratios, etc. should be placed as near as possible to the figures from which they are derived.

The following example (figure 5.6) shows these essential features.

	Very	**Quite**	**Not at all**
Local press ads	23%	43%	34%
Classified ads in local press	19%	41%	40%
National press ads	11%	39%	50%
TV ads	15%	32%	53%
Direct mailshots	9%	23%	68%

Figure 5.6: Usefulness of Advertisements in Influencing Car Purchase

(Source: Hypothetical data, 199X)

Graphs

Line graphs illustrate the movement of one variable against changes in another variable. For example, the graph shown in Figure 5.7 shows sales over time, and such diagrammatic representations of trends over a period are the most common use. Other common examples are sales against changes in price (as in demand and supply graphs used extensively in economics) or health indicators such as levels lung cancer against, say, levels of smoking.
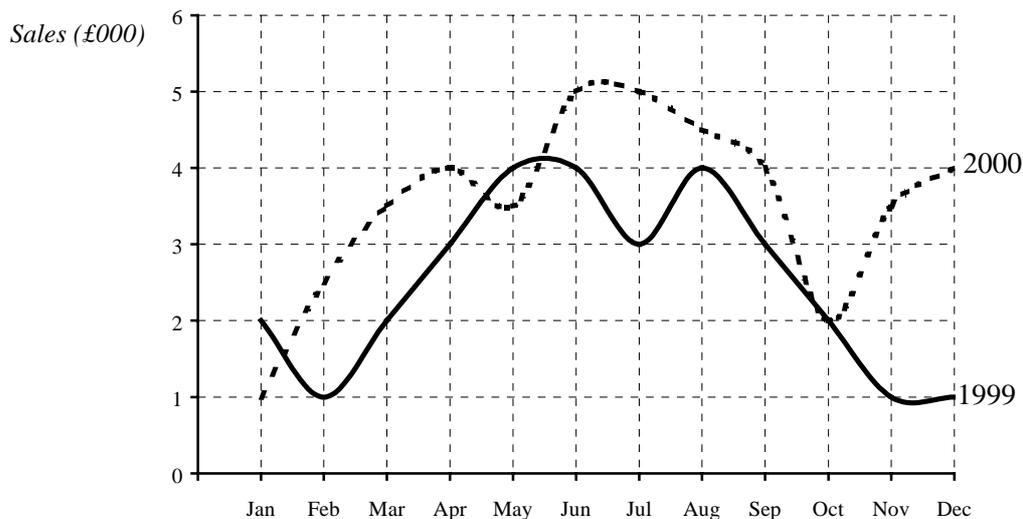
Figure 5.7: Example of a line graph – Car rental sales, 1999 – 2000

(Source: Hypothetical data)

Graphs can also illustrate comparative trends by including figures for several products or different time periods on the same diagram. Thus, Figure 5.7 shows sales on a month by month basis over two years. Lines may be differentiated by the use of different types of line or, where available, by colour.

There are some general rules to remember when planning and using graphs:

● All graphs must be given clear but brief titles.

● The axes of graphs must be clearly labelled, and the scales of the values marked. The origins of scales should generally be included.

● Wherever necessary, gridlines should be inserted to facilitate reading.

Bar Charts

The bar chart is one of the most common methods of presenting information in a visual form. They are similar to graphs in that they display the incidence of one variable in relation to another (for example sales against time), but are more flexible in that greater amounts of information can be incorporated – for example, showing breakdowns of components of a variable.

There are. basically, three types of such charts:

● simple bar charts – which are equivalent to line graphs, but provide a stronger visual image;

● component bar charts – which are equivalent to a series of pie charts; and

● histograms – which display grouped frequency data.

(a)   Simple Bar Charts

A simple bar chart is a chart consisting of a series of bars representing the amount of one variable in relation to another. Usually, a small space is given between each bar to allow them to stand out from each other. The length of each bar corresponds with the magnitude of the item it represents. In Figure 5.8, the height of the bars relates to revenue from theatre ticket sales in a certain month.
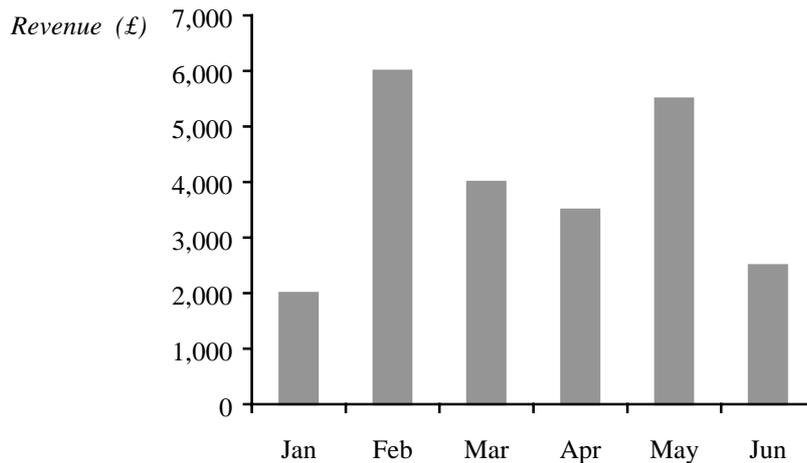
Figure 5.8: Example of a simple bar chart – Revenue from theatre ticket sales by month

(Source: Hypothetical data, 199X)

Bar charts can be enhanced by the use of 3D effects, although you would need to use a computer presentation package to display this effectively (an example is shown below).

In addition, you can add figures for comparative purposes and display these as bars next to each other. Figure 5.9 shows the information on car rental sales from Figure 5.7 as a composite simple bar chart.
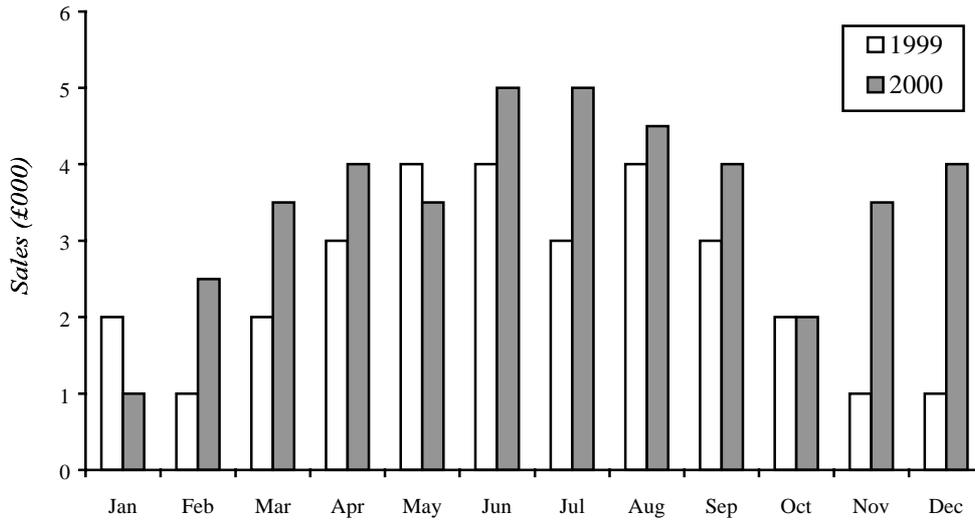
Figure 5.9: Example of a composite bar chart – Car rental sales, 1999 – 2000

(Source: Hypothetical data)

(b)   Component Bar Charts

A component bar chart can be used to give a breakdown of the total amount within each bar of the chart. Thus, in the simple example above, we could divide the monthly figures into the revenue generated by different types of ticket – perhaps showing the number of £20 tickets, £10 tickets and stand-by £5 tickets that are sold in each month.

Figure 5.10 shows a component bar chart, with a 3D effect added, for tractor sales over four years by three different areas.
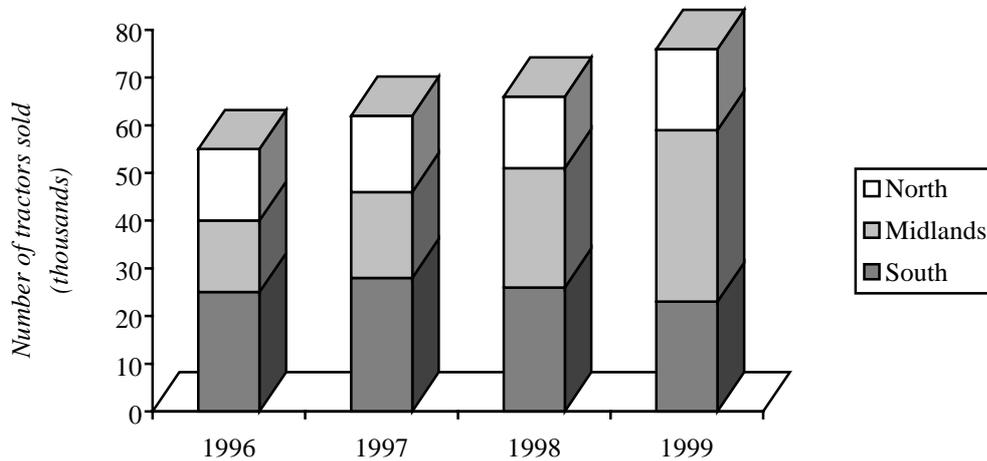
Figure 5.10: Example of component bar chart – Tractor sales by area, 1996 – 1999

(c)   Histograms

Although histograms appear to be the same as bar charts, there are important differences. They are used to display grouped frequency data – for example, information relating to the numbers of people in different age groups.

In Figure 5.11, the histogram shows numbers of managers in different salary brackets. Thus, we can see that 2,000 managers earn between £15,000 and £19,999. This is called **grouped frequency data** as it does not specify how many earn £15,000 or £16,000, but it groups the data together in class intervals.

The following table of information is represented in Figure 5.11:

Class Interval	Frequency
£15,000 – £19,999	2,000
£20,000 – £24,999	10,000
£25,000 – £29,999	6,000
£30,000 – £34,999	4,000
£35,000 – £39,999	6,000
£40,000 – £49,999	2,000

Another key difference between histograms and bar charts is that, with histograms, the **area** of the rectangle, and not just the **height**, is significant. So, for the salary group £40,000 – £49,999, the rectangle is twice the width of the others to represent the fact that this class interval is twice as big as the other class intervals.

It also means that the height of the rectangle is half as high as the class frequency (2,000) would suggest, to compensate for the fact that the class interval is twice the size of the standard class interval of £5,000.

Remember it is the relative area of the bars that is significant, not just their relative heights.
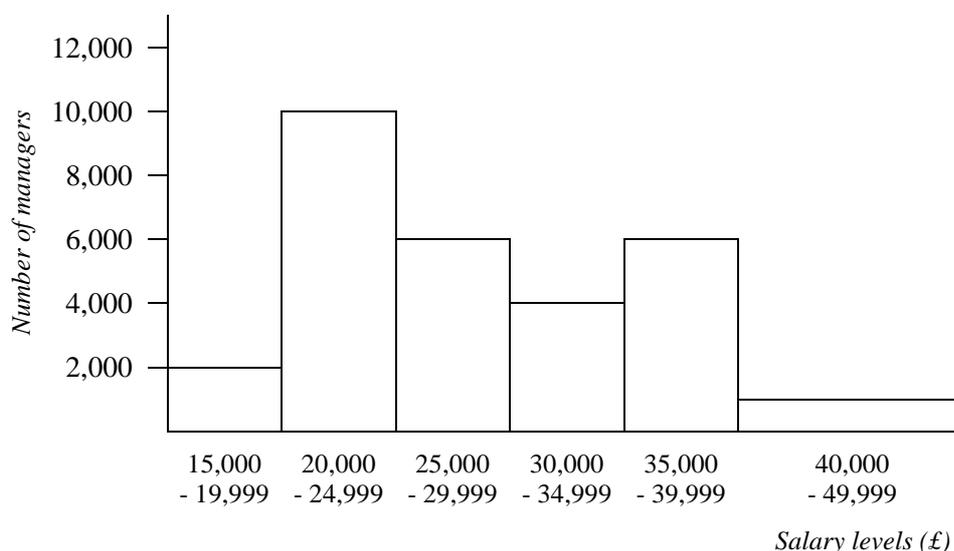
Figure 5.11: Example of a histogram: Managers' salaries

(Source: Hypothetical data, 199X)

Pie Charts

These diagrams are used to show the relative sizes of component elements of a total. They are so called because they have the shape of a round pie, with the component parts appearing as slices. They are used to display only very simple information.

Consider the following table of market shares in the UK car rental market:

	£ million
Kevin Kars	15
Martin Motors	20
Others	65

This can be shown diagrammatically as follows

Total market value: £100m
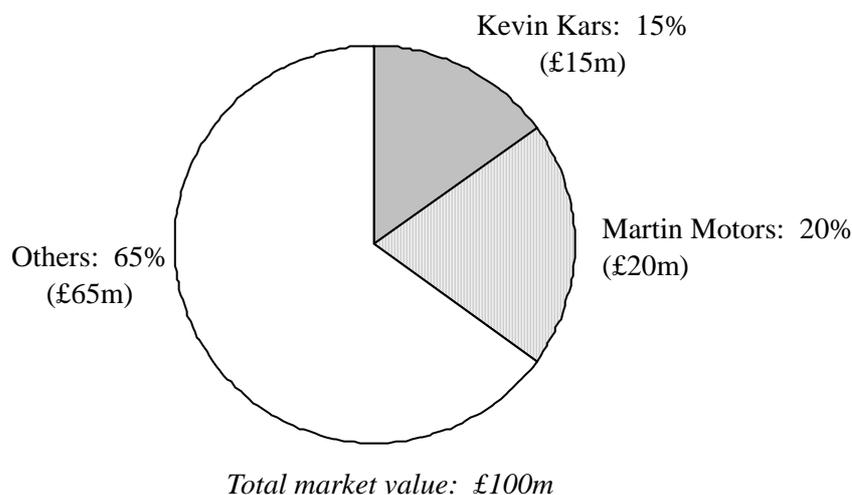
Figure 5.12: UK car rental market – Market share

(Source: Hypothetical data, 199X)

The chart is constructed as follows:

● Using the market value figures shown in the table, the total market value is £100m. The whole pie will represent this figure and as the circle being used will take up 360 degrees, each slice of market share must be sized in proportion to this figure.

● Kevin Kars' market share is worth £15m – i.e. 15% of total market value. To calculate how big the slice should be, you need to calculate 15% of 360 degrees (which is 54%).

● Martin Motors' market share is worth £20m – i.e. 20% of the total market value. 20% of 360 degrees works out as 72 degrees.

● The other car rental companies' share is worth £65m – i.e. 65% of the total, which works out as 234 degrees.

You need to use a protractor to measure out the size of each of the slices in the whole circle.

Alternative forms of presentation are the "exploded" pie chart, in which the segments of interest are emphasised by separation from the main pie, and 3D charts. Both of these are far easier to produce using computer presentation software. Examples are shown in Figure 5.13.
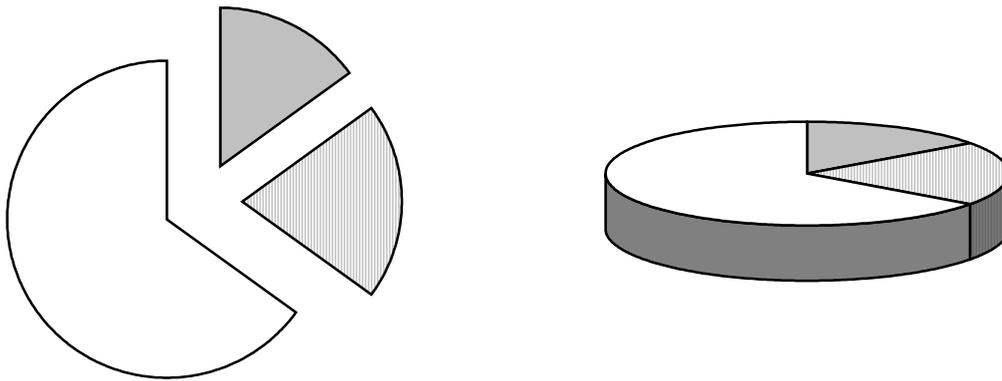
Figure 5.13: Alternative forms of pie chart

Make sure that the diagram is clearly labelled, using a separate **legend** or **key** if necessary, and consider is the actual figures for each segment need to be shown (since it is not possible to read these exactly from the diagram itself). Any written text must be clearly written and accurate. Shading or colours can emphasise key areas.

It is best not to use pie charts with more than four or five component parts.

Pictograms

A pictogram is a statistical diagram in which quantities are represented by pictures or symbols. The appropriate use of a picture or symbol can be a powerful tool in communicating a message, but their use is confined to the simplified presentation of statistical data for the general public, rather than for specialists in the field.

For example, the imports of oil in a particular year may be represented by a number of drawings of barrels, and the imports for another year by a different number of barrels, as in Figure 5.14. If you were showing pig sales, you could use drawings of pigs, or to show sales of satellite TVs you could use pictures of satellites – and so on.
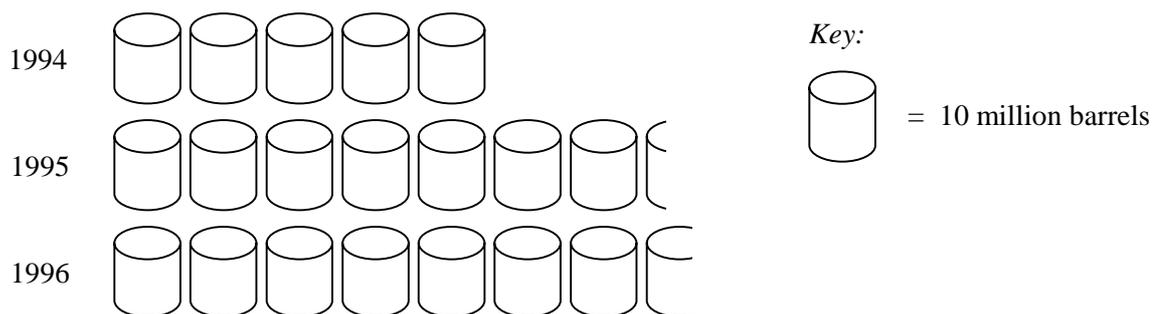
Figure 5.14: Imports of Crude Oil

(Source: Hypothetical data, 1994 – 1996)

It is important that there is a clear key which shows what the symbol represents. In Figure 5.14, a complete barrel represents the sale of 10 million barrels. However, difficulties arise when sales do not fall into neatly rounded quantities – thus, for 1995 and 1996, it is difficult to know what the partially drawn barrels represents in terms of sales.

This form of presentation is not, therefore, precise enough for accurate depiction of figures, nor can they show more than a very limited amount of information. However, their advantage is that they present the information in a simple, readily understood way, and as such, they are often used with interesting graphics to convey statistics on news programmes.

D.   DESIGN AND CORPORATE IDENTITY

What is good design? This is not easy to answer, since it is very much down to personal taste. It is essentially a subjective matter.

However, there are a number of principles which can be identified. At the heart of design is the attempt to communicate, visually, with an audience. An understanding of the characteristics of the audience and of the object of the design are, therefore, essential. Given that, it may be said that good design should be:

● functional;

● reflect the purpose of the object or organisation to which it is applied; and

● be unique to that application.

There are an immense range of application to which design is applied, but we shall be concerned here with corporate identity – principally in respect of company branding through the use of logos. Before we consider these applications, though, we shall review certain common aspects of design which you can use.

Lettering

Typefaces, typestyles, lettering style or fonts are all terms for the type of lettering used by designers and printers.

Typefaces can facilitate the reader's ability to read text easily. They can also convey a personality or mood, and some convey formality or modernity.

There are literally hundreds of lettering styles or fonts, and we illustrate just a few in Figure 5.15. Each font can itself be made larger, smaller, heavier, lighter or italicised. Computer graphics packages are introducing new fonts on what seems like a monthly basis.

Emphasis and impact can be created not only by the use of different typefaces, but also by the size of type, use of headings, line spacing, capitals or underlining, and by the weight and boldness of the type. In fact the layout of the page, with the use of margins, ruled lines, and the use of white space all contribute to the impact of the actual words being used.

ACaslon Bold
ACaslon Regular
Architect
Arial
Arial MT
Black Chancery
Bodoni BoldCondensed
Brushscript
Caligula
Caslon Open Face
CG Times
Courier
Courier 10 Pitch
Courier 16.67 Pitch
Courier 20 Pitch
Courier 5 Pitch
Courier New
Dom Casual
Eurostile
FetteFraktur
Flora
Frank Goth CD
FranklinGothic
FrankinGothic-Heavy
Fusion
Futura
Futura-Condensed
Futura-Condensed Extra Bold
Futura-Condensed Light
Futuri-Black
Gill Sans
GraphicLight
Helv
Helvetica-Black
Helvetica-Condensed
Helvetica-Condensed Black
Helvetica-Condensed Light

Helvetica Inserat - Roman
Hobo
JUNIPER
Letter Gothic 12 Pitch
Letter Gothic 24 Pitch
Letter Gothic 6 Pitch
Letter Gothic
Lotus Line Draw
News Gothic
Parisian
Perpetua
POST CRYPT
R S Alison
RS Oswald Grey
RS Phoenix
RS Pixie
RS Playbill
RS PoloSemiscript
R S Richard Murray
RS Riverside
RS Rudelsberg
RS Sans Serif
RS Sharktooth
RS Slabface
RS St Francis
RS Stymie
RS Tempus
RS ULTRaLINE
RS Upper East Side
RS Upper West Side
Shelley Allegro Script
Σψμβολ
Times New Roman
Times New Roman PS
Tms Rmn
Utopia Black
♥ ✠ ■ ℔ ♥ ✠ ■ ℔ ♦

Figure 5.15: Standard Font Types

Reading and Interpreting Signs and Colours

Visual communication which does not include text has the advantage that it can be understood in any language. International labelling for garments, road signs and electrical goods are all examples of the efficiency of such purely visual communication.

A sign or visual image can summarise a whole body of text and is much easier to "read", so that its impact is immediate. Reading written text is a longer process in that its messages need to be internalised, understood, reflected upon and summarised. They may then need to be translated into oral or written language themselves.

The following are excellent examples of the efficacy of signs and symbols:
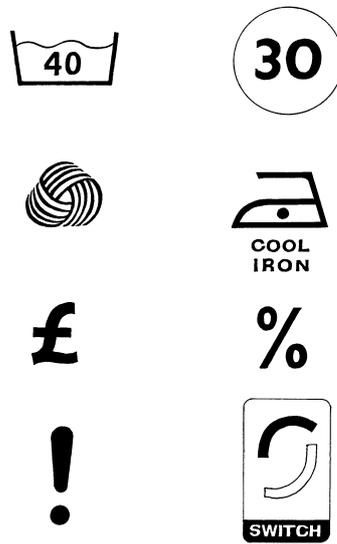
Figure 5.16: Instantly recognisable signs

Colour psychology is an integral factor in visual image design and interpretation. Traditionally colours have many associations, as shown in the following table:

Table 5.1: Colour associations

Blue:	cold, restful, calming, sad, conservative.
Red:	vibrant, young, angry, passionate.
Green:	envy, environmentally friendly, naivety.
Yellow:	sunshine, brightness, new life, cowardice.
Black:	evil, night, darkness, sexy.
Brown:	muddy, nondescript.
Grey:	dull, boring, depressing, dirty.
White:	clean, bright, pure, clinical, peace.

Colours are seasonal and reflect emotions or attitude; they are not merely the absence or presence of light. The shade and tone of a colour can change our perception of the same logo. However, remember that different colours have different meanings in different cultures.

Corporate Image

The purpose of a corporate image or identity is to distinguish the organisation in the marketplace and to communicate values/attributes to various audiences. The most common facet associated with

corporate image is the company logo, but this is not the only element involved. Rather, it encompasses the use of typestyle, lettering, symbols, colour, pictures, slogans or any combination of these, and is used to maintain consistency of style throughout all forms of communication, whether text, oral presentations or purely visual forms such as in packaging.

The potential list of applications is vast. We note some of these below as a guide to the range and diversity available. It also helps us to recognise how repetition of the corporate logo/slogan reinforces corporate image and that the best corporate identity is established through clear design, is instantly recognisable (i.e. legible) and is always the same in essence (colour backgrounds may change).

- Stationery

- Forms

- Publications

- Products

- Packaging

- Advertising

- Promotions/give-aways

- Vehicles

- Interiors/exteriors

- Signs

- Clothing

If we are serious about corporate image, then it has to be applied wholesale, not selectively. If we take the example of stationery, the range of uses will cover all internal and external correspondence, and its application should be rigorously enforced – scrappy internal memos undermine the purposefulness of well produced headed notepaper. The range of stationery applications includes:

- Letterheads

- Continuation sheets

- Envelopes

- Compliment slips

- Business cards

- Memos

- Reports

In fact, any item of company material can have the logo represented on one or all of its surfaces.

The Basis of Corporate Identity

The purpose of the corporate image design is for potential and actual customers to:

- Associate the product(s)/service(s) offered by the company with the logo.

- Recognise instantly and be familiar with the company.

- Adopt some of the values and beliefs of the company in the product(s)/service(s) it offers by association with the design.

One of the major problems in considering corporate image is merely to determine it in design terms. All too easily it becomes a new logo, a new slogan, the introduction of particular colours or a uniform. These elements certainly make up corporate image, and there are numerous image consultants specialising in just that – a design package which is standardised for every possible application. However, the factors which determine the design for the corporate image and which give an organisation its internal and external "personality" can be referred to as the **corporate culture** or **company ethos**. This is the real starting point for the development of the various facets of corporate image design.

Thus, if the design is truly going to reflect the desired image of an organisation, then we need some detailed answers to the following questions:

- What are the name, location, size and function (i.e. product/service areas, range) of the organisation?

- What existing promotional activities are there?

- Is there an existing logo/slogan/corporate colours? How and where are these applied?

- Is a new corporate image required, an update, or a more uniform approach/understanding necessary?

- What are the company's perceived markets?

- What image does the company wish to convey? Key words may include: up-market, sophisticated, wide audience, specialist.

- Are there any preferences as to style, colour, etc?

- Who will sanction any change/implementation?

- What steps will be taken to introduce a new/updated corporate image? Is a transition period necessary? How will the internal market be informed?

- What potential applications will there be of any design? Even if, in the first instance, only a stationery pack (letterheads business cards, compliment slips, etc.) is required, the design and colours may need also to be applied to other non-paper media, such as mouse mats and T-shirts.

The answers to these questions often form the basis of a brief which can be given to a designer to assist the development of the image/identity.

Case Study: MCCormick Group of Companies

The McCormick Group is a construction company. The following extracts from its literature, reproduced by kind permission, show how corporate image is designed and give an indication of the company ethos.

Figure 5.17: McCormick Company Logo

The company logo is on a racing green background with white lettering. It appears on all McCormick divisional notepaper and business cards, on building site hoardings where McCormick is building, and on all company vehicles and workers' uniforms.

The design is particularly effective as it allows different divisions to have their own identity as part of the corporate identity (see Figure 5.18).

Figure 5.18: McCormick Divisional Logos

The Group produces a folder designed as a company portfolio rather than a throw-away glossy leaflet. It contains separate sheets of information (see Figures 5.19 to 5.22) about each of the Group's four divisions, which allows a sense of integration and harmony within the company's publicity materials. The inside covers of the folder, which enclose the separate sheets, bears the text shown in Figure 5.23, illustrating the effectiveness of design in the presentation of text.

CONSTRUCTION
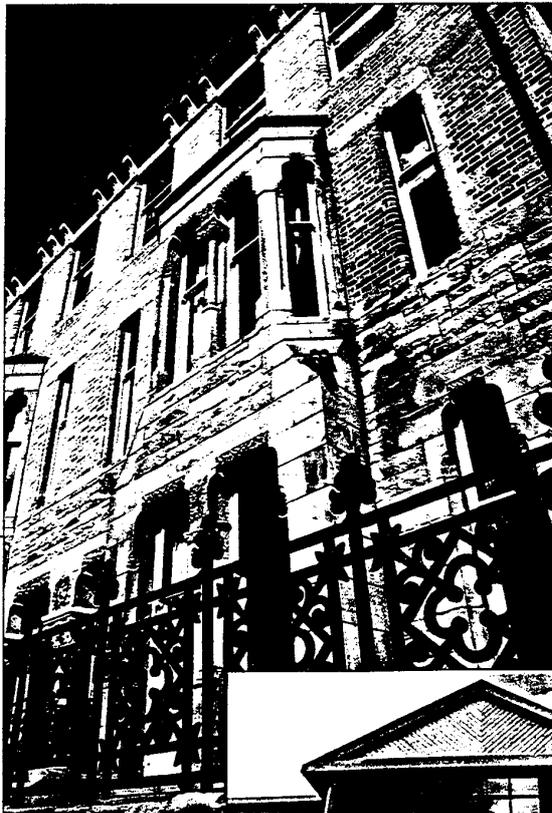
McCormick Construction is the major contracting subsidiary within the **McCormick Group of Companies.** Over 25 years McCormick Construction has built a solid reputation, both in terms of quality workmanship and competitive pricing, regardless of the size of the budget involved, McCormick Construction's commitment to customer service is unparalleled. This policy is reflected through every strata of the company, and this, allied with our ability to complete projects on time and within budget, has allowed us to secure an enviable 'blue chip' corporate client base.

McCormick Construction can offer both turnkey packages and project management, or full design and build services, whatever best suits the individual needs of individual clients. We feel **BS5750** is an effective way of reflecting the company commitment to quality and service. Clients can benefit from our wide range of experience with different projects, in terms of assessing the feasibility of projects while at the planning stage. This ensures that the client is fully aware of potential costs prior to the project in question commencing.

The McCormick Group of Companies has secured a reputation for high quality end products, backed by a high calibre of management philosophy. In this way, set objectives within given projects are achieved comfortably and with a minimum of effort on the part of the client. Quality is the cornerstone of the **McCormick Group of Companies** philosophy.
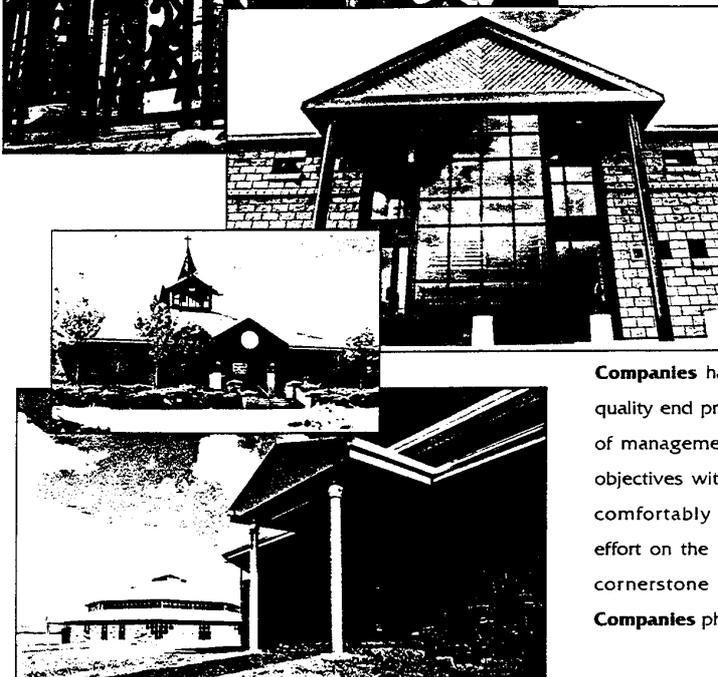
Figure 5.19

McCormick Homes is the prestige house building subsidiary of the **McCormick Group of Companies.** Established to promote private residential developments, the company has designed and constructed several hundred new homes in the Londonderry area. Company Director, **Brian McCormick**, is responsible for all private development projects and leads a team which takes pride in every aspect of the design and construction process.

Every new **McCormick Home** comes with a ten year **NHBC Guarantee Certificate**, giving the customer complete peace of mind, and confidence in the quality of their new home. Every stage of construction of a new home is double checked to ensure that our stringent quality control targets are being achieved consistently. We aim to deliver a new home complete and ready for our valued clients to move in to.

Our parent company has provided quality construction for over 25 years and **McCormick Homes** will continue to enhance this fine reputation. Our success is directly linked to customer satisfaction, and to this end we will continually strive to improve the range and quality of the new homes we provide.

Figure 5.20

INSTANT PROPERTY MAINTENANCE

McCormick Property Maintenance has 25 years of experience in both the private and commercial sectors. The size of the job is immaterial – large or small – the customer can be certain of the highest quality of workmanship at the most competitive price. We also guarantee that the private householder can expect the same prompt and courteous attention that the head of any major corporation commands.

We at McCormick Property Maintenance realise that most building repair work is urgent by nature, and endeavour to respond as rapidly as possible to any scenario which may arise. The opinion of our valued clients is extremely important to us, both prior to and on completion of the work. The comments give us some indication of just how effective we were and what we can do in the future to improve further our already exceptional service. The following testimony from one of our satisfied customers may give some indication of the standards we set and strive to attain.

The **Chief Engineer of Desmond & Sons** states: "McCormick Property Maintenance have carried out many building contracts of both a large and small nature over many years. A substantial volume of this work has been, and continues to be, of a 'crisis' nature, demanding immediate response, and we are pleased to confirm that we have never found the company in any way lacking in either their speed of response or their overall quality of service, indeed the level of service provided is the overriding factor involved in our continued use of **McCormick Property Maintenance.**"

Figure 5.21

WORKSHOP

If it is possible and can be fashioned in wood, the **McCormick Workshop** has a craftsman for the job. Our clients rely on the quality of our workmanship complementing theirs, and right across the spectrum, from private housing to major corporate construction, the craftsmen in the McCormick Workshop do just this, complement and enhance their valued clients' projects. The McCormick Workshop feel that **BS5750** accurately reflects the company's commitment to excellence and, along with our promise of superior quality workmanship, we ensure that delivery and fitting is achieved within an agreed period.

Skilled planning and our policy of absolute customer satisfaction mean that our joinery products are well made, durable and always placed in situ, well within given deadlines. From specialised furniture to high quality bar fixtures, window frames to open staircases, all **McCormick Workshop** products have quality built in.

We are continually aware of the developments in our specialised field and are firm believers in investment for the future. We are continually upgrading machinery and through ongoing training for our craftsmen, our clients can be confident that they are being catered for by the best in the business. After all, our reputation is only as good as our last job and we deeply believe that a satisfied customer is the best advertisment a company can have.

Figure 5.22

This page has been left blank to allow the following figure to appear across facing pages.

˒ INTRODUCTION &

IN THE QUARTER OF A CENTURY SINCE ITS ESTABLISHMENT,
THE MCCORMICK GROUP OF COMPANIES HAS COME A VERY
LONG WAY IN THE VARIOUS FIELDS THEY HAVE CHOSEN TO
VENTURE INTO. NOW AS THEN, QUALITY IS THE CORNERSTONE OF
ITS SUCCESS. BUILDING ON A SOLID FOUNDATION SINCE ITS FORMATION
IN 1969, GERRY MCCORMICK HAS SEEN HIS FAMILY FIRM GROW INTO
ONE OF THE PROVINCE'S PREMIER CONSTRUCTION COMPANIES. THE COMPANY
HAS EXPANDED OVER THE YEARS, AND TODAY HAS DIVERSIFIED INTO
FOUR MAJOR SUBSIDIARIES.

˒ McCORMICK CONSTRUCTION

MCCORMICK CONSTRUCTION IS WELL REGARDED IN THE CORPORATE SECTOR
AND CARRIES OUT ALL TYPES OF BUILDING WORK AS REQUIRED. THE COMPANY
HAS SECURED A 'BLUE CHIP' CLIENT BASE WHICH INCLUDES NORTHERN BANK,
F.A. WELLWORTH & CO. AND SANDOWN NURSING HOMES LTD.

˒ McCORMICK HOMES

MCCORMICK HOMES IS ONE OF THE MAJOR HOUSE BUILDERS IN THE NORTH WEST
OF THE PROVINCE, WITH OVER 270 HOUSES COMPLETED IN THE LONDONDERRY
AREA ALONE. CARE, ATTENTION TO DETAIL AND QUALITY OF WORKMANSHIP HAS
MEANT THAT MCCORMICK HOMES HAS BECOME A RECOGNISED FORCE NOT
ONLY IN THE NORTH OF IRELAND, BUT ALSO IN THE SOUTH OF IRELAND BY
BECOMING A REGISTERED HOUSE BUILDER UNDER THE STRINGENT NATIONAL
HOUSE BUILDER GUARANTEE SCHEME. THIS ACCREDITATION OPENED THE
WAY TO THE MAJOR NEW HOUSING DEVELOPMENT IN SOUTH DUBLIN
WHICH COMMENCED IN THE SUMMER OF 1994.

˒ McCORMICK PROPERTY MAINTENANCE

THIS IS THE MAINTENANCE DIVISION OF THE MCCORMICK GROUP
OF COMPANIES AND IS ENTRUSTED WITH CARRYING OUT A
WIDE RANGE OF REPAIRS TO PROPERTIES BELONGING TO
MANY MAJOR NORTHERN IRELAND CONCERNS. THEIR
REPUTATION IS ENFORCED BY AN ENVIABLE
'BLUE CHIP' CLIENT LIST.

Figure 5.23

COMPANY PROFILE ﹐

THE LIST INCLUDES DUPONT (UK) LTD., DESMOND & SONS,

ADRIA LTD., CHARNOS LTD., STEWARTS SUPERMARKETS,

TEXAS HOMECARE, ABBEY NATIONAL BUILDING SOCIETY, UNITED

FRIENDLY ASSURANCE COMPANY AND ARNTZ BELTING.

﹐ McCORMICK'S WORKSHOP

THE SKILLED CRAFTSMEN OF THE McCORMICK'S WORKSHOP

CARRY OUT A WIDE RANGE OF CARPENTRY JOBS TO COMPLEMENT

THE HIGH QUALITY WORKMANSHIP IN OTHER SUBSIDIARIES WITHIN

THE GROUP. CUSTOM BUILT, FITTED AND FREE-STANDING FURNITURE IS

MANUFACTURED TO ORDER, AS WELL AS HIGH QUALITY BAR FITTINGS

AND FIXTURES. MAINSTREAM JOINERY IS ANOTHER FACET OF THE WORKSHOP,

CONSTRUCTING STAIRS, DOORS AND WINDOW FRAMES OF STRENGTH

AND DURABILITY.

﹐ PERSONAL PROFILE

MR GERRY McCORMICK IS A SENIOR FIGURE IN THE NORTHERN IRELAND

CONSTRUCTION INDUSTRY. OVER 25 YEARS HE HAS HELD A VARIETY OF

IMPORTANT POSITIONS WITHIN THE BUILDING TRADE, INCLUDING MEMBERSHIP IN

THE PAST OF ORGANISATIONS SUCH AS THE GENERAL COUNCIL OF NORTHERN

IRELAND CONSTRUCTION EMPLOYERS' FEDERATION, THE LONDONDERRY

MASTER BUILDERS' ASSOCIATION (PAST CHAIRMAN) AND THE CONSTRUCTION

INDUSTRY TRAINING BOARD. CURRENTLY, GERRY IS A GOVERNMENT APPOINTED

MEMBER OF THE BOARD OF BUSINESS IN THE COMMUNITY FOR NORTHERN

IRELAND, AND IS A BOARD MEMBER OF THE INNOVATION

CENTRE (NORIBIC). THE McCORMICK GROUP OF COMPANIES HAS

STEADILY GROWN IN STATURE OVER THE TWO AND A HALF

DECADES SINCE IT WAS FORMED AND TAKES PRIDE IN THE

CONTRIBUTION IT HAS MADE TO THE LOCAL ECONOMY.

AT PRESENT, EITHER DIRECTLY OR INDIRECTLY, THE

COMPANY EMPLOYS IN EXCESS OF 300 PEOPLE AND

WISHES TO STEADILY INCREASE THIS FIGURE

AS GROWTH CONTINUES.   *Figure 5.23 (Continued)*

Study Unit 6

Interviews and Meetings

INTRODUCTION

If you were asked to identify the various work situations involving the conscious exercise of oral communication, it is likely that you would include interviews in your list. Here, we shall look at the different types of interview which are common in organisations, and at their underlying processes, and then go on to examine some of the principles and practices involved in interviewing.

The existence of formal meetings – for example, boards or committees – as a means of expediting business in many organisations brings with it its own particular forms of communication. The second part of the unit presents an overview of the role of meetings in business and of the way in which they function, before going on to consider the requirements for effective communication in respect of both the procedures and documentation.

A. INTERVIEWS

Types of Interview

As we have emphasised throughout this course, the purpose of an interaction is crucial to determining the communication which takes place. We can see this in respect of a number of different types of formal interview, thereby distinguishing the particulars of each.

It is important to remember, at the outset, that there are two parties to any interview – the interviewer and the interviewee – and that, in most circumstances, the purpose must be considered from both sides, irrespective of the particular side you are on at the time. However, it is always the case that the interviewer has "control" of the process, and there is a responsibility on him/her to ensure that the process allows both parties to meet their objectives.

Note also that, whilst interviews generally represent examples of one-to-one interaction, it is by no means uncommon for the interviewer side to comprise a panel. However, in essence, the interaction that takes place continues to be one-to-one.

(a)   Selection interviews

Recruitment and promotion interviews are the most common perception of the interview, and are the one type of which you will almost certainly have experience – either as an interviewer or as an interviewee.

The objectives of any selection interview are to:

●   find out whether the candidate is suitable for the job and the organisation; and

●   find out whether the job and the organisation are suitable for the candidate.

The first objective is well understood and forms the basis of most questioning, designed to allow the candidate the opportunity to demonstrate his/her abilities in relation to the requirements of the post. The second objective is less well acknowledged, but should be clear if you consider the interview from the perspective of the candidate – he/she will not only want to show the capability to do the job effectively, but also to find out more about it and assess whether he/she does actually want it. As a result, the interviewer has to provide the scope within the interview to allow the candidate the opportunity to explore his/her concerns.

(b)   Appraisal interviews

Appraisal interviews are less well-understood and, if the objectives are not clearly stated, have the potential to become the opposite of their purpose.

The intention of appraisal interviews is to provide a focus for employee development, usually as part of an on-going system which includes the provision of development opportunities. The interview is not, therefore, a one-off event, but one of a series between the employee and his/her manager (or other designated appraiser). The purpose is two-fold:

- to review past and current performance in the job, from both the appraiser and appraisee's points of view; and

- to plan the future development of the individual.

It has, therefore, a positive focus which should condition the interview process. If conducted in a careful and sensitive way, appropriate to this central focus, the appraisal interview can be a positive experience, and will be of benefit to the individual and the organisation.

(c)   Disciplinary interviews

Disciplinary interviews are held to consider whether disciplinary action should be taken against an employee, usually in accordance with the organisation's disciplinary procedure. This can have very serious consequences. It is crucial, therefore, to be clear about the objectives of the formal interaction.

The most important point is that the interview must aim to establish the truth about what has occurred. As such, it cannot be regarded as one-sided, but rather must be a two-way process to tease out the facts of the situation. The principles of natural justice demand that the employee concerned must have the opportunity to put his/her case properly, and issues of personal prejudice and partiality have to be very carefully dealt with.

The need for careful preparation is paramount in this situation. In particular, it should be the culmination of a process which has included a thorough and impartial investigation of all the issues.

In disciplinary interviews, it is usually the case that the interviewee is able to be accompanied by a representative or "friend" – to advise, support and possibly speak on his/her behalf, as well as acting as a witness to the proceedings.

(d)   Grievance interviews

These interviews also form part of a broader procedure – the organisation's grievance procedure – which structures the way in which an employee may raise complaints about his/her treatment at work (by the organisation in general or by an individual member of it) and the steps which are to be taken to deal with the complaint.

On the face of it, the aim of the interview is to resolve the grievance. However, having said that, it isn't necessarily the solution which is the most important outcome. Often the way in which the solution is arrived at can be just as important – even an ideal solution may be ineffective if it leaves the participants still feeling aggrieved (for example, because it was arrived at only after bitter argument, accusation and counter-accusation).

This indicates that the way in which the grievance is handled is every bit as important as the solution itself. Employees arrive at grievance interviews with a sense of injustice. They should leave with at least the feeling that they received a fair hearing and consideration.

The aim, therefore, in handling a grievance interview is to arrive at a solution through a discussion which, as far as possible, provides a satisfactory conclusion to all parties.

Principles and Practice of Interviewing

Although the contexts for these interview situations are different, we have established a number of common themes to them all – the need for the process to be two-way, acknowledgement of the objectives of both parties to the process, etc. We can, then, look at them in the same way when it comes to understanding the way in which interviews are conducted.

The principles and practice of interviewing derive directly from the basic two-stage process we considered earlier – preparation and delivery. We can work this through in respect of the particular requirements of interviewing.

(a)   Preparation

Each type of interview has its own general aims, as we saw above. In preparing for a specific interview, it is important to identify the particular objectives which apply within these. Thus, in respect of a job interview, the particulars of the job itself – and the knowledge, skills and attitudes required for it – will inform the framing of the desired outcomes and the structuring of the interview to achieve them. Similarly, the particulars of an individual case will condition the approach in a grievance interview.

Gathering and organising relevant information means ensuring you are fully conversant with the subject area of the interview – for example, the job requirements, the employee's appraisal records and employment history, the details of the disciplinary or grievance case. Picking out the salient points is likely to provide the structure for the interview. Thus, a selection interview can be built around the details of the job description and person specification, or an appraisal interview planned around the employee's recent work experience and development activities.

It is surprising how often interviewers do not really inform themselves about the person or persons they are interviewing. It necessitates considering the background information available about the interviewee to form a picture of the specific person, such that the interview itself can be tailored to him or her in particular. Thus, for selection interviews, the candidates' application forms will provide details of education and employment background, together with some indication of experience and skills. These can be used develop the general lines of questioning in respect of the job description and person specification, which should be common to all candidates, into specific questions appropriate to each individual.

Arranging the venue and setting means getting the administration of the process right – notification of times (and keeping to them), reception arrangements if necessary, etc. – and establishing an environment for the interview itself which will be supportive of the objectives and help, rather than hinder, the interaction. Thus, there should be a comfortable, private room available, with no distractions in or around it. This may mean arranging for phone calls to be re-directed, warnings to prevent interruptions, etc. The physical layout needs some thought – it is usual to make the setting informal, with no barriers between the interviewer and the interviewee (such as an imposing desk), although some people find that a complete lack of formality makes them feel somewhat exposed.

Finally, most good interviewers – even very experienced ones – generally run through what they are going to say. This can take the form of actually rehearsing questions, particularly in respect of the style and intonation used, or simply talking through the planned structure with a colleague to ensure that it is correct. Clearly, where there is a panel of interviewers (i.e. more than one), this process is essential so that all participants are aware of the proposed procedure.

(b)   Conduct of the interview

It is important for the interview to be structured in order to keep the process focused on the key points and to avoid irrelevant discussion and time wasting. Remember too that the interviewer is responsible for conducting the process and ensuring its successful outcome.

The interview itself can be seen as a four-part event, characterised by the acronym WASP.

W   Welcome – greetings and introductions, each party to the other, with the objective of establishing rapport and relaxing the participants. Particular points include:

- putting the interviewee at ease;

- explaining the purpose of the interview and outlining the way in which it will be structured;

- explaining, if appropriate, about taking notes.

A   Ask – the process of questioning whereby information is sought from the other party in relation to the objectives of the interview. We shall be considering questioning techniques in detail in the next unit, but other points include:

- using questions prepared in advance, based on the general aims and specific objectives of the interview and the particular circumstances of the interviewee;

- using open questions (which encourage developed responses and further discussion), working from relatively general and easy ones to more specific and difficult ones;

- listening to, and probing the interviewee's responses.

S   Supply – providing full and honest responses to questions which will show the respondent in the best possible light, according to their objectives. Particular points include:

- backing up assertions with examples wherever possible;

- being reasonably concise, particularly in the case of the interviewer (the interviewer should only do 20 – 30% of the talking).

P   Parting – ending the interaction on a positive and cordial note, with a clear idea of what has happened and what will happen next. Particular points include:

- summarising conclusions, where appropriate;

- identifying when, what and how any action arising from the interview will be communicated.

B.   MEETINGS – AN OVERVIEW

Formal meetings of committees and boards, sub-committees, steering groups and working groups are widely used in both public and private sector organisations. In addition, all sorts of different groups, within and outside business organisations, hold formal or informal meetings on a regular or ad hoc basis. Thus, it may be said that all organisations have a committee or meetings structure of some sort.

Note that, whilst the discussion here will be mainly focused on committees or other formal meetings, the principles apply generally to most types of meeting.

The Role of Meetings

The main functions of any of these meetings may be summarised as:

● providing for a dialogue between members, allowing the exchange of information, views and opinions;

● generating ideas or solutions to problems;

● monitoring and evaluating performance or progress;

● making policy and other decisions.

These general functions hold true for the meetings of informal working groups, a school's parent-teacher association, and company boards and governmental bodies. There are, clearly, differences in scale and the issues considered, but the general purpose is the same.

Constitution

The particulars of the meetings of a body are determined by the nature of the body itself and this will be laid down in its **constitution**. The constitution of a body will cover such fundamental matters as:

● membership – who is entitled to be a member and how membership may be determined, numbers, length of service, etc.;

● terms of reference – the powers and duties of the body (what it can and cannot do, and what it must do), so for example, it may have the power to make proposals and suggestions, but not actually to commit the financial resources of the organisation;

● timing and frequency of meetings – this will vary according to the functions and purposes of individual bodies, so for example, a company AGM will be an annual event, but a school governing body may meet once a term, or a finance committee may meet every six weeks.

All bodies holding meetings have a constitution of some sort. Formal committees will certainly have a written constitution, sometimes governed by legal regulations, which spells out in detail all these issues. However, even informal groups will have an implicit understanding of these matters – whether they are discussed and agreed among the members or simply taken for granted.

The Organisation of Meetings

Meetings don't just happen – they have to be organised. This can be considered in three stages:

● before the meeting – the planning of what will happen;

● at the meeting – the conduct of business during the course of the meeting itself; and

● after the meeting – wrapping up the proceedings by producing the record of the meeting and following up on the issues discussed and decisions made.

We shall review these in very general terms now, and then go on to look at specific aspects of the procedures and documentation in the next two sections.

(a)   Preparation for meetings

Meetings have to be planned. Efficient undertaking of the necessary work prior to any meeting – whether it is for the AGM of a public company, a local government committee, or a work group – will invariably smooth the conduct of business at the meeting itself.

The starting point is the preparation of an agenda. This is fundamental to any meeting as it sets out, in order, the business to be transacted. It provides, then, not only the statement of what the meeting will consider – its content – but also defines its structure.

However, prior to that, perhaps the first step is to determine if the meeting is really necessary! Many of us will have felt the frustration of spending two or three hours in a meeting where no progress has been made, or there was nothing of substance to discuss, or even where it was evident that decisions had already been taken elsewhere. Meetings are an expensive way of using staff time and effort, so they need to be cost-effective. Therefore, if it is not a required meeting of a formal committee, its appropriateness or necessity should be questioned and alternatives considered for achieving the desired outcomes.

(b)   The conduct of business

The proceedings of a meeting may be considered as a sort of structured discussion. The structure is partly provided by the agenda, but the way in which the discussion is conducted is governed by rules of procedure. Again, formal bodies will have very specific rules of procedure, usually codified and written down as **standing orders**, but even informal groups will have some generally understood rules about how the meeting will be conducted.

There are a number of specific roles within all meetings. Some of these are implicitly agreed, but more often there is a deliberate appointment to these positions – either by election, or as a consequence of holding a particular post in the organisation. Two of these roles are particularly important:

● the chairperson; and

● the committee secretary/clerk.

At the meeting itself, it is the chairperson who actually controls the meeting. This is the key role in any meeting, setting the tone and style of the meeting and generally ensuring that the business of the meeting is efficiently and effectively conducted. However, this role is not simply one of a passive, neutral referee of proceedings. It is invariably a very powerful position, giving the holder the ability to control what is discussed and how that discussion progresses.

The secretary's role is to ensure the effective administration of the meeting, including all work before and after the proceedings, and to advise the meeting on the application of the rules of business. This is a key role and, for formal committees and boards, will be fulfilled by a senior officer of the organisation. He/she will have a close working relationship with the chairperson to ensure that the proceedings go smoothly and the desired outcomes are achieved. In informal meetings it is often the case that the secretary and chairperson's role are held by the same person.

The clerk's role is essentially that of carrying out the work of agenda preparation and writing the minutes, including (of necessity) taking notes of proceedings at the meeting itself. In many smaller bodies, this work is actually carried out by the secretary.

It is worth pointing out that these roles – committee secretary and clerk – should not be confused with the general office positions of secretary and clerk. They are specialised and very important positions in relation to meetings specifically.

(c)   Work after meetings

This breaks down into two areas – the preparation of the record of the meeting, and ensuring that decisions taken at the meeting are subsequently implemented.

The particular requirements of the formal minutes of proceedings go much further than the recording needs for most business meetings. In essence, all is required is:

- a record of all essential information, particularly what has been decided;

- a statement of who has to take what action.

This preserves a record of salient information and can be circulated to all participants and others involved or interested. It is important to remember that the information must reach all those who need to know – either for general awareness or because action is required – rather than just those who were present. It is helpful, though, to direct the recipient's attention to the relevant items in what may often be very large reports or minutes.

Finally, it is worth noting that meetings exist to facilitate the execution of work. It is sometimes tempting to think of them as talking shops which have to be serviced, but have no relevance after the event. However, if they are to have any meaning, the discussions and decisions must be followed up and put into effect. They then form a key participative element in the decision making and operating processes of the organisation, rather than a distraction.

C.   DOCUMENTATION FOR MEETINGS

The Agenda

The main purpose of the agenda is to set out, in order, the business to be transacted at the meeting. As such, for formal committees and boards, it will usually be the subject of some discussion between a number of interested parties – the committee chairperson, senior officers and the committee secretary. For other types of meeting, preparation of the agenda may be the sole responsibility of the person who will chair the meeting, but advice may be sought on what items of business should be included.

An agenda should normally include the following elements:

- the time and place of the meeting;

- apologies for absence;

- provision for confirmation of the minutes of any previous meeting, and for consideration of matters arising from them (where the issues are not included as items elsewhere on the agenda);

- provision for the reporting and consideration of any correspondence received (where the issues are not covered by items elsewhere on the agenda);

- a subject heading for each item of business to be transacted, together with a brief explanatory comment, if necessary (often by reference to attached reports, correspondence, etc.);

- a final item of "any other business" to allow for discussion of any issue which has arisen since the production of the agenda; and

- a final, final item to determine the date of the next meeting.

For most formal committee or board meetings, it is the job of the committee secretary (or administrator or clerk, however the post is termed) to prepare the agenda. He/she will usually maintain a file of items which may potentially require the committee's attention. These items may be derived from:

- correspondence received;

- matters referred by other committees, etc.;

- circulars and directives from other bodies (particularly government);

- matters – usually policy issues and usually in the form of "motions" – referred by members or officers for discussion and/or resolution.

Although it is usual for items for formal committees to be submitted in writing, in practice there will often be the need for discussion between the secretary and individual members, perhaps also with the involvement of the chairperson, to clarify how items will be presented on the agenda.

It is important to remember that, if a meeting is to be effective in its deliberations and decision-making, members will need time to familiarise themselves with the agenda and any supporting papers. This means that the agenda must be sent out some time prior to the actual date of the meeting.

When exactly will vary. The required notice of business to be transacted may be formally stated in the constitution or standing orders of some formal bodies. Local authority committees, for example, have a statutory duty to have the agenda and relevant reports, etc., available for public perusal three clear days before the date of the meeting.

In some organisations, notice of the meeting may be sent out separately – prior to the agenda itself. In others, notice of the meeting and the agenda may be combined.

Agenda may appear in a variety of formats, depending on the conventions of the organisation in question. The example in Figure 6.1 combines the notice of the meeting with the agenda, and the agenda contains all the usual necessary elements.

You should note the following points about this example:

- The headed paper gives clearly the contact number for the secretary, so that apologies for absence can be sent, and discussion about items of urgent business can take place.

- The prior notice provided by the date of dispatch of the agenda – in this case, almost four weeks.

- The date, time, and place of the meeting are clearly set out. Here, they are included in the letter which gives notice of the meeting. If the agenda was sent on its own, this would need to be included at the top of the agenda.

- Members are specifically reminded about considering "any other business" in advance of the meeting.

- The first four items are usually fixed for all regular meetings and generally appear in this order. Items 7 and 8 are also fixed.

- The items which form the variable subject matter of any meeting should have sufficient detail to enable members to understand the nature of the item. Where appropriate, there should be a reference to any relevant documentation.

HAMSHIRE ASSOCIATION OF PARISH COUNCILS

SALEM AREA COMMITTEE

Chairman: Mr.J.Tobey	*Hon Sec.*: Mrs J Pride
Bragdale Farmhouse	16, High Street
Bragdale Road	Lower Allwood
Feversham LX53 8XY	Settingly LX95 7DY
Tel: 01878 555555	*Tel*: 01878 888888

7 February 200X

Dear Sir/Madam,

The next meeting of the Salem Area Committee will be held on Monday March 2nd 200X, at 7.30 pm in the Council Chamber, Salem House, Settingly.

The agenda and supporting papers are appended. If you have items for inclusion under "any other business", they should be with the Secretary no later than 5.00 pm on Friday 27 February.

Yours sincerely,

J Pride

Secretary

AGENDA

1. Apologies for absence.

2. Minutes of the last meeting.

3. Matters arising.

4. Correspondence.

5. Reports from representatives on:
    (a) Police Consultative Committee
    (b) Executive Committee

6. Rural Lanes Survey – Report AB/123 refers

7. Any other business.

8. Date and topic for next meeting.

Figure 6.1: Example of an agenda

Minutes

It is generally the case that, after any meeting, a record of what transpired at the meeting is made. This may be in the form of a few hand-written notes, a memorandum, a note for filing or a report of some kind, possibly with notes for action. The appropriate form will vary with the type of meeting and the importance of what took place.

The situation with regard to formal meetings of a committee or board is rather different. The proceedings of such meetings are recorded by the minutes.

>**Minutes are the factual record of the proceedings and resolutions of a meeting. They constitute a true and impartial record of the events.**

The prime function of minutes is to place on record the proceedings of a meeting as the basis for subsequent action. The minutes constitute the authorisation for such action to be taken.

(a)   The format of minutes

The way in which the events at a meeting are recorded in the minutes is likely to vary between organisations. Each has its own particular conventions about what should be recorded and how they are set out.

However, there are a number of general principles which can be identified.

As noted above, the primary purpose of the minutes is to provide authorisation for actions to be taken. As such, then, the key element which **must** be recorded is the decisions taken at the meeting.

This may be done by simply stating the motions passed by the meeting, using the exact words of the motions as voted on. For example:

>*Resolved: That the Treasurer's Report (ref. FD.045) be adopted, subject to the assumed Government funding becoming available for development of the new site by the end of the financial year.*

This may mask considerable debate about the issue, including the proposing of, and voting on, various motions and amendments. However, at the simplest level, the only important point is the final decision at which the meeting arrived.

Whilst this is the essential element of minutes, it is often the case that they need to go further than this in order to accurately convey the sense and meaning of a meeting. Indeed, this may be necessary since, in the event of a dispute as to what transpired or was agreed, the minutes may be cited as legal evidence.

Thus, it is quite possible that the minutes will record all motions and amendments put to the meeting (with their proposer and seconder), together with brief details of discussion and the subsequent vote. It is also sometimes necessary to record details about the voting on particular motions – either as totals "for" and "against", with abstentions, or even the way individual members voted.

Finally, in addition to decisions taken by the meeting, it is normal for the minutes to record events in respect of each item on the agenda, including:

- those members present, together with absences for which apologies were made at the time;

- agreement about the minutes of the previous meeting(s), together with any changes made to them;

● brief notes about items or issues introduced to the meeting, but not specifically referred to on the agenda or supporting papers – as in the case of reports or discussion about matters arising from the previous minutes, correspondence and any other business;

● the start and finish times.

(b)   Minute writing

The production of clear and accurate minutes is an exercise requiring many of the communication skills we have considered previously. It is important to listen effectively and consistently, to take accurate notes, and then to translate these into a coherent and comprehensible written statement.

There are a number of points of good practice in minute writing, as follows.

● The essence of minutes is that they are a brief note – i.e. a condensed statement – of the proceedings at a meeting. As such, they are not the same as a report. They are designed, basically, to record the decisions taken, and that is all. On the other hand, they need to be sufficiently detailed and complete to convey what transpired at the meeting and to provide clear instructions and authorisations for action.

● Where it is accepted practice that minutes should record, in some detail, the discussions which take place, this should not become unwieldy and over-long. It should not obscure the central point about the decisions made.

● The minutes – as a whole and in each individual statement – should be positive, free from ambiguity and capable of standing on their own. For example, resolutions should not merely say "resolved accordingly" or "resolved as agreed", but state precisely what the decision was, using the exact wording on which voting took place.

● Minute writing requires accurate and concise language, involving objectivity and the absence of ambiguity. The minutes should be written in third person – i.e. using "he/she", "they", "them", etc. – and in the past tense.

● It is important to emphasise the word "factual" in the definition above. Minutes must not express opinions or give interpretations of what has been said. They should be simple statement of fact. Thus, it would be wrong to write:

> *"The Treasurer displayed such excellent persuasive skill in putting forward her argument that she took all the members with her."*

This should be expressed as:

> *"There was unanimous agreement to accept the Treasurer's report."*

● Minutes should be completed as soon as possible after the meeting. It is surprising how quickly your understanding of your own notes can fade, and your memory of a certain discussion grow cloudy.

● It is normal practice in many organisations for the accuracy of the minutes to be checked with the chairperson before circulation.

The following example (Figure 6.2) of an extract from the minutes of a meeting illustrates many of the points made above.

SALEM PARISH COUNCIL

GENERAL PURPOSES COMMITTEE

Minutes of the meeting held on 9 January 200X, between 7.00 pm and 9.00 pm in the Assembly Room at Salem House

1. Members present: Councillor Green (in the chair); Councillors Brown, Black, Cyan, Grey, Maroon, Purple, Red, Tan and White.

2. Apologies were received from Councillor Jones

3. The minutes of the meeting held on 12 December 200V were approved and signed as a true record.

4. Pay rise

    After a full discussion, it was proposed by Cllr. Red and seconded by Cllr. White that the opinions of all employees be sought by means of a questionnaire. An amendment that the questionnaire should also ask if employees would prefer a one-off or staged arrangement was proposed by Cllr. Cyan and seconded by Cllr. Black. This was passed by six votes to three, and the motion that the questionnaire be produced and circulated was then passed unanimously.

Figure 6.2: Example of minutes (extract)

D. PROCEDURE IN MEETINGS

The proceedings of a meeting may be considered as a sort of structured discussion. The issues for discussion, and their order, are structured by the agenda, but the way in which the discussion itself and general interaction of the participants is conducted is structured by the various rules of procedure.

Constitution and Standing Orders

The proceedings of any formal meeting are generally governed by the constitution of the committee or board, etc. – which states what it is allowed to do – and written rules of procedure, usually known as standing orders. The constitution and procedural rules of some bodies are governed by legal regulations, which may lay down specific requirements.

The constitution of the body, as we have seen, is fundamental, in that it defines the terms of reference of any meeting and, thus, conditions what powers and duties may or must be exercised. The constitution also sets out the framework of meetings in terms of their timing and frequency and also, possibly, the establishment of certain roles.

Standing orders are concerned specifically with the way in which meetings are run. These rules are essential if meetings are to be conducted properly since they cover such matters as:

● the number of members who must be present in order for the meeting and its decisions to be valid (the quorum);

● how and when questions may be put;

- how motions and amendments may be moved;

- the length of debates;

- the methods of voting;

- control over the behaviour of members.

Here we have a very clear example of the inter-relationship between the written and spoken word. Written standing orders exist to promote the effectiveness of oral communication.

Roles Within Meetings

As we have seen, there are a number of specific roles within all meetings.

At the meeting itself, it is the chairperson who actually controls the proceedings. This is the key role in any meeting, setting its tone and style and generally ensuring that the business of the meeting is efficiently and effectively conducted.

His/her role can be summarised as being:

- to ensure that the meeting is properly constituted and that there is a quorum;

- to control the meeting in accordance with the standing orders and any other legal requirements that apply;

- to take the business in the order that it appears on the agenda (unless the committee determines otherwise), by opening the discussion and guiding the debate such that all those who wish to speak may do so;

- to ascertain the sense of the meeting at the conclusion of the discussion on an item (by reaching common agreement or by voting on a specific motion) and ensure that the decision reached is properly recorded.

In all these matters, the chairperson is assisted by the committee secretary. This is certainly not the same as an office secretary. He/she is likely to be a senior officer in the organisation and will be responsible for:

- advance notice of the meeting, agenda preparation, and general housekeeping and administration (room bookings, resources required), etc.;

- advising on the application of standing orders and any legal matters (such as statutory provisions and common law requirements) during the course of the meeting;

- recording the proceedings accurately, distributing the minutes and following-up any decisions after the meeting.

In many meetings, the secretary is not a formal member of the body itself and, therefore, has no voting rights or any formal role in discussions. However, as a senior officer, his/her contribution is likely to be sought (or provided) on the issues involved in agenda items and the implications of proposals and decisions.

General Rules of Procedure

All members have a general responsibility to participate actively in the proceedings of the body. This requires a commitment to the work of the committee and careful preparation by all concerned so that each member is knowledgeable about the topics under discussion.

It also means that each member has a responsibility to other members to allow contributions to be heard and to enable discussion to flow freely and positively. Thus, order is not just the responsibility of the chairperson – it resides in all participants!

In order to ensure that chaos does not reign, there are a number of **conventions** – general rules of behaviour – which need to be followed, including:

- acknowledging that the chairperson is in charge;

- speaking through the chair – waiting for permission to speak, and always addressing remarks to the chairperson, not directly to other members (although this may not be so necessary in less formal, smaller meetings);

- keeping to the point – avoiding digression or pursuing one's own particular agenda to the detriment of consideration of the items before the meeting;

- interrupting other speakers only for procedural reasons – for example, to seek clarification through a "point of order" or to seek to give a "point of information".

Obviously, the degree of regulation of formal committee or board meetings is far in excess of that applying to most other types of meeting. However, the principles discussed here apply to all meetings. There will always be some formal or informal rules about what the meeting is competent either to discuss or to decide, and how it should go about it. Such rules may be extant and clear to all participants (or may be clarified in the course of the meeting), or they may need to be considered and determined during its course – as may be the case with informal meetings of work groups. There will always be a chairperson with a role to ensure the proper conduct of the meeting in accordance with the points outlined above. And there will always be someone responsible for planning the meeting and recording the proceedings.

Effectiveness in Meetings

Let us now take a little more time to consider how these general rules and conventions actually apply within meetings. Although the procedures followed for meetings and committees will vary from one organisation to another, the existence of these "rules", in whatever form, will go a long way towards ensuring that the business is conducted in a coherent and professional way, using time and resources efficiently, and minimising the risk of personality clashes which would be counter-productive.

As a structured interaction, meetings can be held to conform to the same basic principles as any other form of structured communication – they need to be properly planned and should have a beginning, a middle and an end.

(a)   Planning

We have seen that the start point for any meeting is the preparation of the agenda and its circulation to members. However, whilst this sets out the structure of items for discussion, it does not constitute a detailed plan for the way in which the meeting may go. As with all forms of interaction, it is advisable to prepare carefully beforehand – considering the objectives of the interaction, the participants involved and the information required.

Accordingly, before the meeting itself, there is invariably some kind of prior consideration of the agenda by the chairperson, together with the secretary and, possibly, other officers. This will concentrate on identifying the various issues involved in each item of business, together with any desired outcome. This process of considering how best to handle the discussion and to achieve objectives is always useful for any type of meeting. Time for most meetings is likely to be restricted, so it is essential that there is clarity about what needs to be covered, and the best

way of achieving it. These pre-meeting briefings do not, however, take decisions about the outcomes of agenda items.

(b)   Opening the meeting

The introductory phase of any meeting should outline the business to be conducted and set the proceedings in the context of previous meetings, as well as covering any particular administrative arrangements (such as time constraints, etc.). This is very much the responsibility of the chairperson.

The chairperson will first call the meeting to order, to ensure that everyone present is giving full attention, and will formally declare the meeting open, usually stating the time of the start of business. A check may be made that everyone has received the agenda and any supporting papers, and is clear about the business to be conducted and any administrative arrangements.

The first agenda item to be taken will be "Apologies for absence" to establish a formal record of attendance. Apologies are normally read out by the secretary and will be recorded in the minutes.

The minutes of the last meeting need to be approved as a true and accurate record, and signed by the chairperson. At this stage, the responsibility lies with every member to have checked the minutes, and to be prepared to speak up to correct any inaccuracies. This is of particular importance if the minutes have legal significance. Adjustments can then be made before the minutes are signed.

It is likely that action will have been taken on the basis of decisions made at the previous meeting, or that there will be issues arising from the discussion then which need clarification in the light of present circumstances. The opportunity to consider such matters, where they are not specifically covered elsewhere on the agenda, is provided by the agenda item "Matters arising from the minutes". The chairperson him/herself, or any other member, may seek information, usually from the secretary, in order to complete the picture presented by the minutes. The chairperson needs to ensure that there is no duplication here – the purpose is not to go over old ground, but merely to clarify any issues arising subsequently. Even if certain members were not present at the original discussion, the temptation to allow them to ask a lot of questions should be resisted!

(c)   Main business of the meeting

Having completed the introductory phase, the meeting can move on to the substantive business before it, according to the agenda.

Discussion of each item generally follows a set pattern – again reflecting the beginning, middle and end structure we have seen in all forms of communication.

●   *Introduction to the item*

This will be done by the chairperson, one of the members, or an officer or other person attending specifically to provide information about the particular item. The intention is to focus attention on the key issues about the subject, in order to direct the following discussion.

It is often the case that agenda items are supported by reports or other documents which provide background information. It is customary for the report's author to introduce it by means of a short presentation. The requirements of this are the same as have been covered extensively above – careful and detailed preparation and delivery. It is not appropriate to read verbatim from the report or other paper(s), and the level of detail does

not need to be that great where the material has been circulated in advance. Rather, the introduction should concentrate on the key issues and pick out specific points, expanding and clarifying them as necessary, on which the discussion should focus.

● *Discussion of the item by members*

It is likely that a good many members of the meeting will have points to make in respect of the issue under consideration. The purpose of the procedural rules is to facilitate them doing so, such that they can put their thoughts to the meeting and have them heard and considered. This requires some degree of formality and order to the discussion.

It is the chairperson's duty to take control and impose such order. Normally, all comments should be addressed through the chairperson. This means that individual members do not address each other directly and get involved in personal, potentially acrimonious, debates across the meeting. It also helps to ensure that only one person is speaking at a time. In order to make a contribution to the discussion, members need to attract the attention of the chairperson and signal their desire to speak. This, in turn, means that the chairperson must be aware of members' intentions at all times. The power to bring individual members into the discussion can allow the chairperson to exercise considerable control over the discussion, and it should, therefore, be exercised fairly and even-handedly. It can be a source of friction where members feel excluded, particularly if their views are opposed to the chairperson's.

As a sanction to maintain order in the face of members flouting the rules and conventions of discussion, the chairperson has the power explicitly to exclude individuals from speaking – ruling their contribution "out of order" – or even to banish them from the meeting.

Discussion of many items in formal meetings often takes place around specified proposals to be adopted as decisions of the meeting. We shall consider the details of this below.

● *Conclusion of the discussion by means of taking a decision*

The purpose of discussing a particular item is to come to some sort of conclusion about it which reflects the views of the meeting. This may take the form of adopting a specific decision, or it may simply be a matter of the chairperson summarising the key points of agreement. However, even such a summary constitutes a decision of sorts in that it is likely to form the basis of further action, sanctioned by the meeting.

Formal decisions taken within a meeting need to be based on a **motion** proposed by one member and supported ("seconded") by another member. Such motions may be simply to adopt the recommendations set out in a report, or they may be detailed suggested courses of action put forward at the time by a member (including the chairperson), based either on a perceived consensus of opinion at the meeting, or their own particular viewpoint.

The wording of a motion can be very important, as it may establish policy or commit resources. They need, therefore, to be clear and unambiguous. For example, the following would meet this requirement:

> *"That the committee authorise the expenditure of £5,000 to G. Gnomes & Co. to carry out landscaping work on the HQ grounds in accordance with the proposals made in their tender document."*

On a motion being put to the meeting, and following appropriate discussion, the chairperson will take a vote among those present as to whether it should be agreed and become a decision of the body. The rules about voting are normally set out in the standing orders, and they are likely to include provision for the chairperson's "casting vote" – a second vote available for the chairperson to use in the event of a tie between those for and those against the motion.

It is open for any member to put forward amendments to a motion. An amendment is a suggested change in the wording which will alter, to some degree, the meaning of the proposal. Amendments which negate the intention of the original motion are not allowed – the same effect may be had by simply voting against it. So, for example, the following amendment to the above motion would be acceptable:

> *that the additional sentence "Payment to be made in two equal instalments, based on completion of works on the front and rear of the premises." be inserted at the end of the proposal.*

However, the following amendment would be ruled out of order:

> *that the word "not" be inserted before the word "authorise".*

Any amendments also need to have a formal proposer and seconder, and should be voted on before the initial motion, so that, if carried, the revised motion can then be considered and voted on.

All decisions made by a meeting need to be recorded precisely by the committee secretary and included in the minutes.

● *Conclusion of the meeting*

The final phase of the meeting is entered when all the substantive items on the agenda have been considered.

There is always an item of "Any other business" on the agenda in which members can raise issues of significance which are not covered elsewhere. Sometimes, this is put on the agenda as "Any other **urgent** business", and this is really the key to this item. It is not intended that important and substantial new business should be brought up at this stage of the proceedings. Members should usually clarify with the secretary or the chairperson in advance if they have items they wish to raise here, and the chairperson may need to take a decision about what can and cannot be accepted, perhaps suggesting a full discussion at the next meeting instead.

The last element is to agree the date and time of the next meeting, after which the chairperson declares the meeting closed, noting the exact time of closure.

Study Unit 7

Electronic Communication Systems

INTRODUCTION

Although people refer to the present time as the "age of communication", communication has been important whatever the century because people have always found the need to convey information to each other. This has been true from the Stone Age through to the computer age. The big difference now, of course, is that we have the means to convey vast quantities of information at great speed.

It is important to be aware that this is what computers have enabled us to do. In other words, computers are a tool allowing us to communicate much more efficiently than in the past.

How we choose to convey that information content will depend upon:

The nature of the information;

The quantity;

The need for accuracy; and

Added features such as emphasis for clarity and understanding.

In this study unit, we will examine some of the principal ways in which we can communicate electronically. Nowadays, the use of Internet and email are prevalent. So we will be interested in how these communication methods can help us in business. There is much more to the story however as electronic communication will cause business people to change not only how they communicate, but also how they actually work.

A.   MODES OF COMMUNICATION

Non-Electronic Communication

Before we consider electronic communication, it will be useful to look again at some of the basic features of more traditional methods. This provides a contrast with electronic communication.

Face-to-face interaction

We are all very familiar with face-to-face situations. Communication is immediate and any response or feedback is also immediate. In addition, we are able to use body language and voice tone in the communication to help add extra emphasis to particular points or to convey doubts and feelings. As there is no other form of communication where we can make this claim, this sets face-to-face communication apart as being special. There are disadvantages. Most of us are quite poor at expressing what we mean, and so this form of communication can easily lead to ambiguities. However the speed of response makes immediate clarification possible. The biggest disadvantage of all is that both the communicator and the receiver must be in the same place at the same time.

Telephone

This method fulfils many of the advantages of face-to-face interaction in that there is immediacy both in conveying the information and the response, and voice tone can be used to enhance the message. But there are also many of the disadvantages. The possibility of misunderstanding is probably even greater as there is no body language to clarify meaning. Whilst both communicator and receiver are not in the same place, they must both be present at the same time. Answer machines give some flexibility in this respect, but only to a very limited extent. We will shortly see that the telephone features strongly in most electronic communication.

Letters

This traditional method of getting information to people without being in the same place at the same time is also the slowest form of communication and is only really suited to formal communication such as initial introductions, contracts and specifications. Letter formats have little to offer very fast electronic communication.

Memos

This means of communication allows people to get basic information to others within organisations. The assumption is that the recipient will understand the full context. Nowadays, memos have been replaced by email (electronic mail).

Fax or facsimile

A forerunner of email, it is just a method of sending a hard (paper) copy of some document over the telephone. It allows letter type communication without the built-in delay of carrying the specific piece of paper from the communicator to the recipient. You could include fax communication within the section on electronic communication as fax does depend on computing facilities although it is an older form of communication. The original document needs to be read electronically and it is the electronic version that is transmitted over the telephone system. At the receiving end, the electronic document is printed onto paper before becoming accessible to the recipient.

Electronic Communication

Electronic communication is the basis of our *Information Society* as it gives everyone ready and easy access to vast quantities of information.

There are several forms of electronic communication, but they all involve the conversion of the information to a format suitable for transmission over a particular medium. No matter which format the original information is in, be it on paper as words or graphics, or be it spoken, it is converted, by a computer, to the binary form of 1s and 0s. It is **digitalised**. It is not necessary for you to understand exactly how this is done or even what it means, but you should be aware that computers use digitalised data consisting of groups of 1s and 0s representing the two states of off and on, of any electrical circuit.

We are familiar with the normal undulating wave format of sound, light and radio. This is known as the analogue format. The digitalised wave format consists of discrete values so that the waveform appears in a square format.
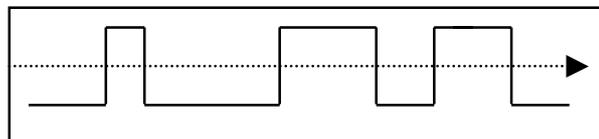
Figure 7.1

Electronic communication relies on a **communications infrastructure** consisting of telephone lines, fibre-optic and other types of cable, microwave and radio links, satellite links and computer networks, which we call the **communications medium**.

If the information is being transmitted over the traditional telephone system it will first be converted back to analogue form, as this is the form the telephone system was originally designed to handle. Speech is in analogue form. If it is to be transmitted through modern fibre optic cables, it will be converted to light waves. And, of course, radio involves radio waves. We will refer to these format changes as **coding**.

It is then a relatively straightforward process to transmit the data from computer to computer. The first machine codes the information into the required format and the second reassembles it into the form we wish to view it.
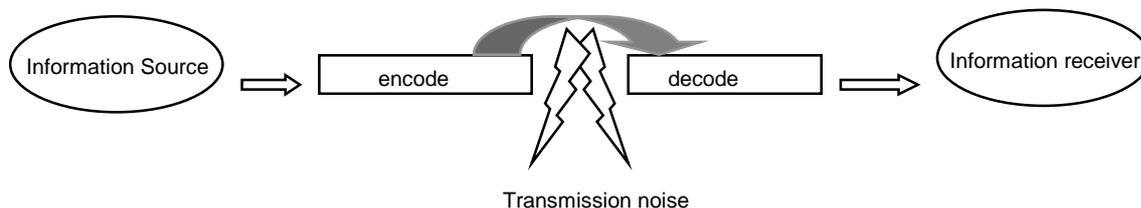
Figure 7.2

The main problem in the above scenario is the interference of the transmission **noise**. This is anything that interrupts or distorts the signal. Allowance must be made to check for this and to correct any distortions. If, at any time, you have attempted to connect your computer to a computer network via the telephone system you will have heard a series of sounds. These are the computers 'speaking' to each other. Typically you will hear something such as:

	Translation	
Beeeeep	are you there?	
Peeeeep	yes, I'm here	
Chuuusssh	*I'm sending a message*	
Burrrrr	not understood	
Whaaaan	*do you understand this?*	Noise interference here
Zzzhuussst	too fast for me!	
Burrrzzzzz	what about this?	
Chirp	OK, go ahead.	

Whatever communications medium we are using, it provides a **communications channel** for the transmission. The capacity of the channel depends upon its **bandwidth**. This is just a measure of how much data the channel can carry. Coaxial (TV style) cable has the lowest bandwidth whilst fibre-optic cable has the highest.

We must not confuse bandwidth with **speed of transmission**. They are related, but not necessarily directly. The speed of transmission will depend directly on the amount of data being sent through the channel. The more informative we transmit, the slower it travels as the channel becomes congested. On the other hand, with a greater bandwidth, the channel is less likely to become congested. At the other end of the scale, if only small amounts of data are being transmitted, they can travel equally fast over a narrow bandwidth as congestion is not an issue. The usual metaphor used here is an airport carousel. Its moving speed (bandwidth) remains constant. If the aircraft is half full, your bags appear sooner and possible all together! If the aircraft a full 747, the bags will be all jumbled up and can take a long time to appear.

The communications medium will always allow information to be transmitted in both directions. This then leads to problems in co-ordinating the two-way communication link so that messages in one direction do not interfere with messages in the other. You need to be familiar with the following terms as you will certainly come across them.

● **Simplex** communication: only travels in one direction (i.e. a radio transmitter).

● **Half-duplex** communication: allows transmission in both directions, but only one at a time.

- **Full-duplex** (or just **duplex**) communication: allows transmission in two directions simultaneously. The telephone system uses this system and so do computers.

It follows that any system we are interested in will be full duplex. This then leads to another problem - how to maintain a separation of the messages.

- **Synchronous transmissions** are co-ordinated by transmitted data being sent at a fixed rate and the received data arriving at the same fixed rate. Each message is then recognised as it all arrives at this specific rate. Internal computer communication is made this way.

- **Asynchronous transmissions** use a recognised marker at the start of the message and another at the end. This is the method used in computer to computer communication.

- **Parallel transmissions** involve breaking the message into separate chunks, which are then sent by different routes to the receiver where the chunks are reassembled into the message. This technique is fast and is used between the computer and its printer or a network.

Finally in this section, we will look at way in which telephone companies are meeting the demand for more transmission capacity.

- The first requirement is for a **dedicated** or **leased line.** This is just a permanent connection between two points in contrast to the normal telephone system, which routes the connection through a dial-up switching telephone exchange. A dedicated line is clearly more reliable and the connection, considerably faster. There is also much higher security for the information.

- In conjunction with the dedicated line, the service will offer **ISDN** (integrated Services Digital Network) transmission. ISDN is also available over normal dial-up facility. As its name suggests, ISDN enables the information to be transmitted in digital format. Not only does this cut out the need for encoding the information before transmission, it also offers greatly enhanced transmission speed and accuracy.

B.   THE INTERNET

Background

You may ask: 'What is the Internet?' In reality, it is nothing more than an enormous **network of computer networks**. It is thousands of computers connected together.

The Internet originated with the United States military and their fear of nuclear attack following the Soviet Union's launch of Sputnik, the first satellite, in 1957. To protect vital communications within the university based technical and research facilities of the Department of Defence, four universities in the US west (Stanford University, UC in Los Angeles and Santa Barbara and the University of Utah) were connected together via a dedicated line. By 1969, four other US networks were connected in so was born the internet. Once connections were expanded into the normal telephone dial-up system, it became possible to bring in computers across the world. Local comparable set-ups were developed in many places and whole groups of computers were connected into the system. It did not take long before we reached the stage that we now know in which the Internet stretches to every part of the world and, using cell or mobile phones, to places remote from the actual computer.

The basic component of the Internet is a computer network. At this stage, there are two types of network of interest to us. We will introduce two more later in the section:

1. A **LAN** (Local Area Network) is, as you would expect, a group of computers, which are geographically close to each other, connected together. Typically, computers within a business or part of a business will be connected in a LAN.

There are two principal ways (or protocols) in which data is transmitted around a LAN:

● The Ethernet standard requires the sending computer to first check whether the network is busy or not. If it is not, the **packet of data** (we shall define a *packet* later) being sent is despatched to every computer in the LAN, but only the computer to which it is addressed will take receipt of it. Others just ignore it. If the network is busy, or if two computers send out a data packet at the same time causing a collision, then the sending computers wait a random amount of time and try again.
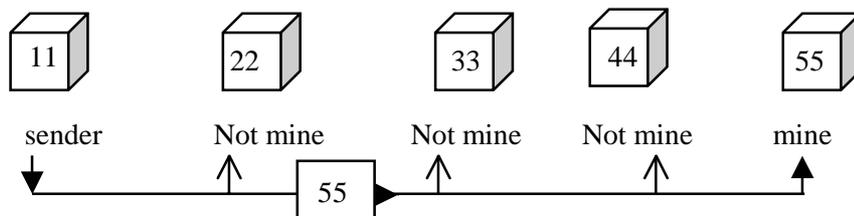

Figure 7.3

● The **token ring** standard involves signals or tokens continuously travelling around the network (see Figure 7.4). The sending computer waits until a token is passing by and, if the token is not already carrying a data packet, attaches the data packet it wants to send, to the token. As the token passes each of the other computers, each checks the token and the address of any attached packet. If it is addressed to that computer the packet is accepted and the token is then free to accept another packet.
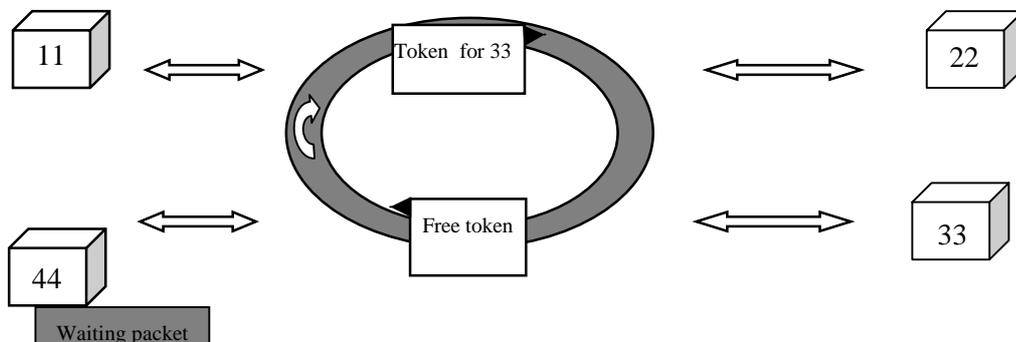
Figure 7.4

The next point we need to consider is how the data is actually sent. As some of the messages can be very large, such as a video or other multimedia message, to send the message intact would clog up the whole network. We have only to think of a very large load travelling up a motorway. The police escorting the load require everyone else using the motorway to wait behind, much to their frustration. It would be the same across the network if entire messages were sent intact. Instead, the message is divided up into sections called **packets**. Each packet is given the destination address of the whole message and any other information necessary such as the sender's address. The packets are then sent out individually. If alternative routes are available, then each packet will take whichever route is available and convenient. When all the packets for the message have arrived at their destination, and they need not arrive in order, the message is reassembled.

The complete message   *individual packets*   *The complete message*

Packets sent by separate routes   *the message is reassembled*
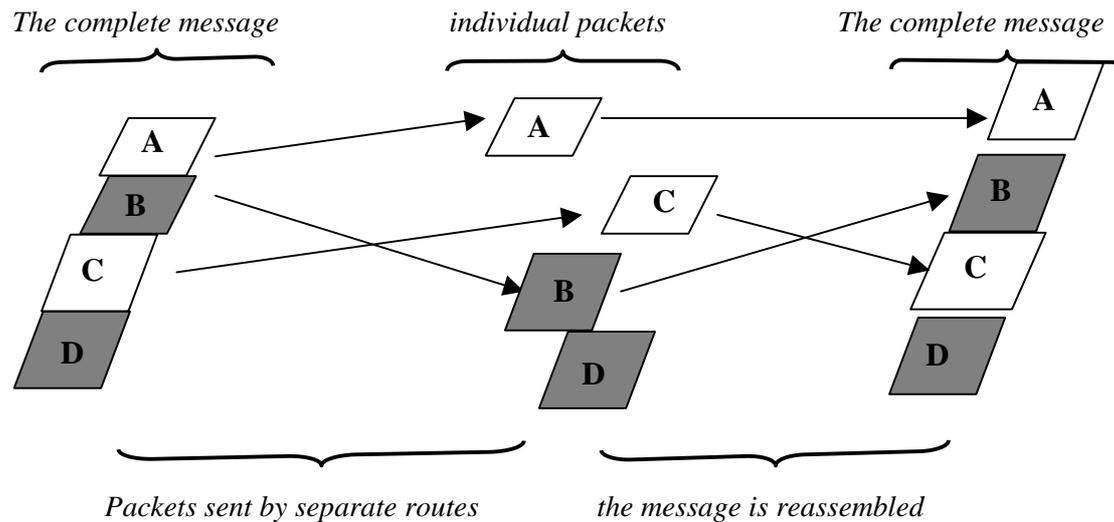
2. A **WAN** (Wide Area Network) is more or less the same as a LAN except the geographical restriction does not apply. A **packet switching** protocol, as for a LAN, is used in the same way. A WAN will probably consist of several LANs connected together. To co-ordinate the delivery of resources across the WAN, a server machine will be used. A **server** is a computer wholly dedicated to a specific task. There are several different tasks that servers provide:

- Some will store resources such as files and application software which they can then serve, on demand, to the various computers within the WAN. In those kinds of systems, the individual computers do the processing, the server simply holds the files.

- With application servers, the server does the processing on behalf of the client computers. It will be provide with more powerful processing facilities in order to do this.

- In some other cases, the server is in charge of the routing of the messages around the WAN.

Servers can fulfil a number of different tasks within the network, but the common feature is that they are all accessible from the individual computers and they provide some kind of service on behalf of individual computers.

The Internet will rank as the world's largest WAN! However, the Internet lacks the control and cohesiveness of a WAN. At the level of the Internet, however, much more than simple servers are required.

Operations

Now we will have a look at the Internet itself and how it works. As we have already seen, it is a network of networks of computers.

The following illustration of a segment of the Internet, shows that, as well as various LANs connecting together, there is a central connection known as the **backbone**. This is a connection specially designed to move information around the Internet at very high speeds and it connects all the principal servers on the Internet.

backbone
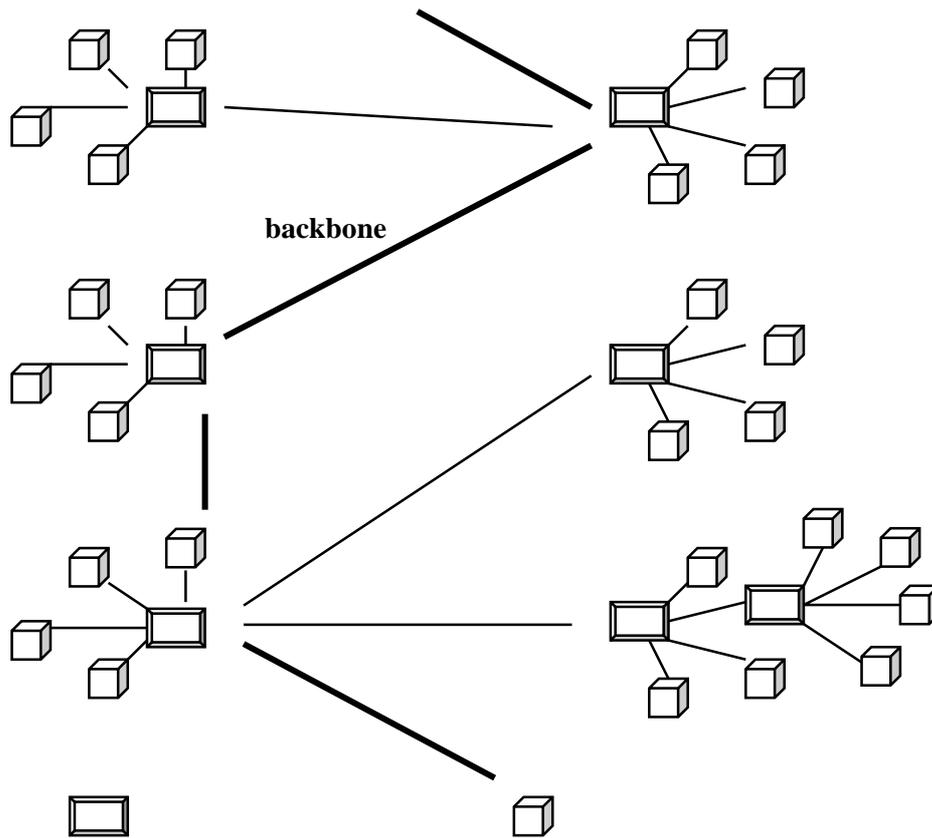
Key   = *Internet server*   = *LAN or WAN computer*

Figure 7.6

We have already discussed the packet switching protocol used to move information around networks. In the following discussion, I freely refer to messages, as that is what we are sending. But in reality, as we have seen, the message is broken up into packets. The particular version of this protocol used by all computers on the Internet is called **TCP/IP**. This stands for Transmission Control Protocol/ Internet Protocol. This is just the label given to the set of rules followed for sending messages across the Internet.

The address of anything on the Internet is known as a Uniform Resource Locator (URL). Both email and web addresses are known as URLs. The crucial part of any URL is the **domain**. This identifies the computer at the receiving end of the transmission. For instance, the domain or destination address is given by the user with an extension such as:

name**.**com,

name**.**co**.**uk,

name**.**edu,

name**.**ac**.**uk,

name**.**gov**.**uk.

If there is no country extension such as uk, fr, de, ir etc, then the address is registered in the United States.

- The first thing the computer does is convert the address that we type in, into a unique **IP** number. (You will sometimes see the IP number used in the address, especially in error messages). All such addresses are held on **domain name servers** or DNS server. These servers hold groups of addresses in the dot**.**com style. For instance, a DNS may hold all the **.**gov**.**uk addresses of the UK Government.

- Whenever a message is sent to such an address, the name server used by the sender's computer (the ISP's computer referred to below) will consult the **.**gov**.**uk **DNS** for the IP address required.

- Each network has at least one **router** connected to its own network and to one adjoining.

- A sent message first goes to the router, which then determines the path the message should follow across the Internet. The message is first directed to the backbone, and then is sent at high speed across the backbone to the point closest to the ISP computer. From there it goes to the ISP and then on to the designated recipient.

- Frequently used paths are held in store by the router to save time.

- If the path to the address is not known, the message is passed to a higher level router, and so on.

The success of the Internet is due to its ability to reroute the path followed by a message should the normal or obvious path be unavailable for any reason. Messages can even be stored for a short time until a path becomes available.

Individual users gain access to the Internet via an **Internet Service Provider** (**ISP**). This is a specialist company that provides a host computer into which the user can dial and make a connection with their own computer. At this point the user will be requested for a user name and a password, both of which having been registered on making the agreement with the ISP. Once these are checked and accepted, a full connection is made with the ISP computer and the user's computer becomes part of the Internet for as long as it remains dialled in.

Now we return to the final two types of network referred to some pages ago.

1. An **intranet** is a closed network which uses the TCP/IP packet switching protocol and whose visible pages will look just like Web pages. The network is, however, only accessible by those with authorisation, typically within one organisation. In other words, it is like a private mini Internet.

2. An **extranet** is a secure extension to an intranet that has a constantly open link to persons outside of the Intranet authorisation. These are likely to be customers, suppliers, trading partners and so on. Of course, an extranet will not give access to the whole of the intranet.

Intranets are developing extremely quickly as businesses realise their potential. Basically, where a business has operated a LAN, by the addition of web servers, it can readily be turned into an Intranet. By creating a common interface across the internal network in this way, there is a possibility of all kinds of uses. Typically these will include: -

- email (which will already have been available over the LAN);

- pages of company, product and market information;

- on-line conferences and discussion points;

- bulletin boards, which we discuss later;

- and, through a connection to the Internet, all that is available there.

Should the intranet be connected to the Internet, and most are, a secure interface is required. This will prevent outside unauthorised access to the intranet and the import of certain web pages into the

intranet. A '**firewall**' is used to provide the secure interface. This is special software designed for this purpose, as its name implies. Most large organisations use the Internet to provide the communication connections between their various site centred intranets and so firewalls are used to protect the intranets (see Figure 8.7).

The company intranet   **firewall software**   **the Internet**
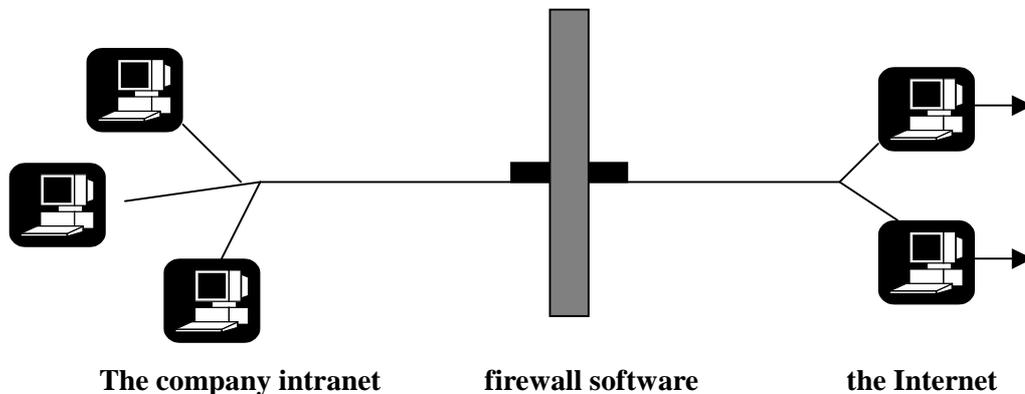
Figure 7.7

There must be no other external connection other than through the firewall. Not only does the firewall protect the company networks from outside threats, it also allows the company to monitor all communications between the internal and external networks.

Electronic Mail (e-mail)

e-mail or **electronic mail** has become common place in recent years. It is simply correspondence between two or more users over a network. Where the network is a LAN, WAN or intranet, the network is tightly controlled and the email correspondence will be virtually direct. E-mail is also sent over the Internet using a version of the TCP/IP protocol for addressing. This will then involve the services of an ISP and their router.

When an e-mail message arrives at its destination server, it is stored in an area of that server which the user calls their **mailbox**. It will wait there until the actual recipient logs into their ISP's e-mail system. There are two types of system used for mailboxes:

- Messages can be retrieved to the users' own computer where they can be opened, read, edited and so on.

- Messages remain on the ISP's server and the user opens and reads them there. This method has the advantage of making the mailbox accessible from any computer when the correct user name and password are entered.

An e-mail address or URL has the form:

My-name @ my-ISP.com

first part   second part extension

The first part of the address is the user name. The @ symbol is just a separator. The second part of the address is the name of the ISP server to which the user is registered. It has a unique IP number. The final part of the address is the domain name that designates the DNS server holding the address registration.

When an e-mail message is sent, the local mail server first examines the second part of the address to identify the ISP server to which the message is addressed. If this is the same as the local mail server then the message is forwarded directly to the appropriate mailbox. All other messages are sent out

over the Internet. As we saw previously, this means the message will be forwarded to a server on the Internet backbone and then by any available route over the backbone to the nearest point to the ISP server. It is then directed to the ISP server and to the recipient's mailbox at that server.

Videoconferencing

Videoconferencing enables two or more people in different locations to see and hear each other at the same time, sometimes even sharing computer applications. A communications technology as rich as this offers new possibilities for a variety of purposes.

Placing a video call is like making a phone call. After you connect, you see the other person in colour video and you may be able to transfer files.

A **videoconference system** must have audio-visual equipment such as a screen monitor, a camera, a microphone and an output speaker. The system also needs a communications link. A broadband satellite link with studio-quality equipment gives an excellent full-motion video connection. However, this is very expensive. Modern communications have generated an interest in video systems that transmit information via the Internet, which are more realistically priced.

A very realistic solution is to make the connection using ISDN technology. It is economical and gives high-quality videoconferencing. ISDN works over the normal phone lines and provides enough bandwidth for smooth audio and video transmission. This is typically 15-30 frames per second. In contrast, an Internet-based connection has to share bandwidth with other Internet data and this can cause some loss of audio and produce a jerky video.

Videoconferencing connections may be limited to a closed network such as a LAN or they may use dial-up phone links.

It is the way in which these two systems transmit the data that marks out the difference between videoconferencing systems.

ISDN has most of the advantages:

- It adheres to standards, so systems created by different vendors can still connect together.

- It works over regular phone lines, so no special wiring is necessary.

- Once a connection is made, the bandwidth is available and the quality is predictable.

- In most systems, bandwidth can be extended by increasing the number of ISDN lines.

On the other hand, it is even more inexpensive to use the Internet. As always, it comes down to making a choice based on the way the videoconferencing is used. If it is just to make brief phone calls, then the Internet is fine. But if a number of people are involved in a technical conference, then ISDN technology will be best. Only in the biggest organisations will a satellite connection be feasible.

Videoconferencing over normal phone lines requires a piece of equipment called a **codec** (short for coder-decoder). The codec takes the analogue video signal, digitises it and then compresses it. The codec also has to decode the received transmission, and this can take its toll on the video and sound quality. The most obvious consequence of a slow codec or low-bandwidth connection is a jerky picture and an audio time delay.

As you will have noted, I have mentioned that the signal is **compressed**. The reason is simply that without compression, a **digitalised video** requires far too much storage. In fact it would require a large computer to store and play a full-length feature film without compressing the size of the file. This is achieved by losing some of the data. For instance, as we noted above, the normal video frame

rate is about 30 frames per second. Whilst more than this is required for television quality, a lesser rate would take less storage. This is where the jerkiness comes from.

Another, more satisfactory, technique is to only store any changes from one frame to another. For instance, a video of a person talking will have a fairly static background. It is therefore not necessary to transmit the background with every frame. Even more can be achieved in such a case as it is likely that only the person's mouth and eyes move to any great extent. Not even all the person's face features need be transmitted with every frame. All of this allows a great deal of compression to be achieved without significant loss to the picture. Another technique is just to reduce the size of the displayed picture!

With **audio**, other compression techniques are used. The basic technique here is to take a cross-section sample of the signal at regular intervals. The number of such samples obviously affects the play-back quality. Low quality systems use about 8000 samples per second, whereas music quality take about 44000 samples per second. More than this is not practical for the normal PC computer.

There are two principal **types of videoconferencing systems**, the normal PC computer systems which displays the video in a small section of the computer screen and room sized systems which have one or two large screens and usually display all the local audience as well as the remote audience. The camera can be anything from a tiny camera on top of the computer to a high-quality camera with remote pan and zoom features. The controls available allow users to adjust the volume, and sometimes even pan and zoom the camera.

The **benefits** of a videoconferencing system are fairly self-evident. As a communication medium, it stands out in a number of ways.

(a) First of all, it's almost like being there. The visual connection and interaction between participants enhances understanding and helps participants feel connected to each other. This goes a long way toward building relationships in a way that e-mail or the telephone cannot. A videoconference system can be further improved by including video or audio clips, graphics, animations and computer applications.

(b) It has also been found to heighten the motivation of learners.

(c) It will improve the participant's communication and presentation skills as each participant is very aware of the person at the other end.

(d) It Increases Connections with the Outside World, especially where a live visit is not possible except on rare occasions. Videoconferencing is usually easier than visiting, so communications can be more frequent, saving time and resources.

C. THE USE OF IT IN BUSINESS

In this section we will look at some specific ways in which the modes of electronic communication can help in business situations, and how working practices are changing as a result.

Telecommuting

In the Middle Ages, people mostly worked from their homes in cottage industries of one type or another. With the advent of the Industrial Revolution, people were drawn into the cities and factories. These factories were able to use steam power to drive many machines simultaneously, thus hastening the end of the cottage industries. For about one hundred and fifty years or so, everyone lived close to the factory or coalmine that they worked in. Then, with increased prosperity, families moved to the outskirts of the cities, to the suburbs and back into the country areas. This brought about the need to

commute to the cities where the work was. At the same time, the cost of maintaining an office or other facilities in city centres escalated.

Computing facilities have developed to such an extent that network technology can be used to take the work back out the people in the country and so reduce the considerable costs and time involved in maintaining central facilities and travelling. In other words, cottage industry has, to some extent, been re-established.

The benefits to the company are considerable:

- There are lower costs in office and infrastructure.

- There is less absenteeism.

- Generally productivity will increase.

For individuals there are also benefits:

- time saving through avoiding commuting;

- a better quality of life generally; and

- lower costs in a number of areas, and tax advantages.

However, there are some problems for the individual, and ultimately, for the company:

- The individuals can quickly become isolated from co-workers. They are taken out of the 'information loop'.

- It is difficult to develop a company career structure, as individuals are remote from each other and from higher management.

Whenever a **telecommuting system** is implemented, companies find it necessary to have periodic briefings and other meetings when the remote staff gather at some central point to socialise and be kept up-to-date on developments within the company.

Telecommuting systems use intranet technology. Whether the individual is sited at a desk in Head Office or in a back room of their own house is of no consequence to the technology. Communication is just as fast and just as complete. Access can be given to archives and libraries, e-mail will be available and, as it is a fast internal system, using central servers, powerful computing power can be made available.

Whilst there is no doubt that telecommuting will increase over future years, its development will always be restricted by the disadvantage of individual remoteness. Over time, the distinctive working culture of the company is lost, and individuals cannot develop their inter-personal skills. Network technology also makes it possible to move the workplace out of the cities and closer to the country living workers. This is, without doubt the growing trend, especially with the new IT industries. Several of these remote sites can be set up, all inter-linked in an intranet.

Workgroup Computing

The trend that I identified at the end of the previous section will also lead to the development of **workgroups**. Groups of two or more workers will share the same information resources via a LAN client/server system. This, in turn, means that each member of the group or team can be working on different parts of a project whilst, at the same time, having access to what each other part of the group is doing.

This facility is made possible through the introduction of **groupware** application software. This is software that supports collaborative work. **Workflow management** software will also be used to

automatically forward the documentation throughout the group. A typical use of a workgroup approach is the processing of a major request within the company, as illustrated in Figure 7.8.

1.   The proposal is formally submitted to the departmental manager.

2.   He/she forwards it to the appropriate director

3.   Who then submits it to the board members for approval.

4.   Their response is fed back down the line and, if approved

5.   Implemented by the original applicant.
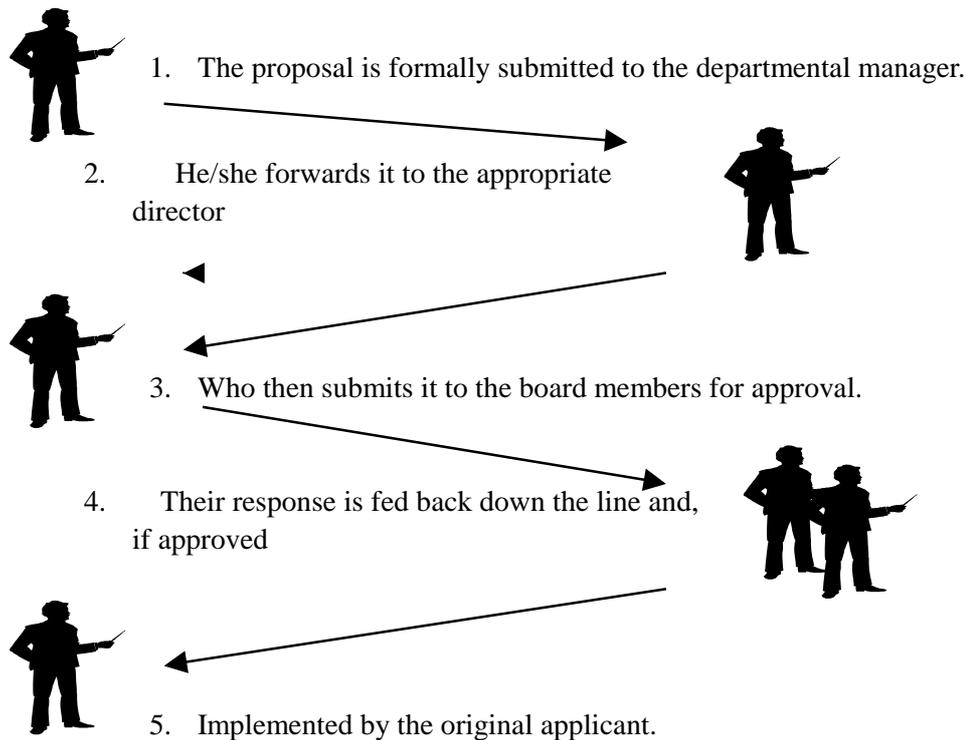
Workgroups need not be sited together. Because of the networks used, the group can be scattered anywhere in the world. Of course, this will involve a network larger than a LAN. An intranet might be most appropriate. Taken to its extreme, 24-hour global working is possible whereby part of the group can start the project in Europe, which is then taken over during the second half of the day by another part of the group working in Northern America. As they finish, yet another part of the group in Asia can work on the project. Finally, the European workers return for a new day and take over where the Asian workers leave off. In this way, there is no break in the working day.

Bulletin Boards

A computing **bulletin board** is little different to the bulletin boards found lining many an organisational office or corridor. They are an electronic form of notice board used to convey information to a whole group of people.

Electronic bulletin boards are available through the company intranet and over the Internet. If the board is accessed over the Internet, a password system will be required in order to protect the privacy of the board. It can serve any purpose, and like a normal notice board, it can be subdivided into sections. However, unlike a normal notice board, the bulletin board can be spread over several pages of display with electronic links from one to the other.

Whilst some of the group will only be able to read and search through the postings made to the bulletin board, others will be able to make the postings. These can be messages such as schedules, update specifications, feedback from elsewhere, diagrams and messages of any kind that someone wishes the whole group to see. In addition, an appointed person, perhaps a manager, will have the facility to edit, change and delete items from the board and to check that everyone has accessed the board recently through the board's monitoring facility.

Commercial Services

The principal electronic commercial service that we are now all aware of is **shopping** (e-shopping) over the Internet. This is a perfectly simple service whereby the customer views the available products and then, via the Internet connection and screen, indicates a wish to purchase the item. Either credit card details are supplied or the bill is added to the customer's account. Delivery is then made in the usual way, by physical transport! There are two weak points in this system.

1. There is the matter of the security of credit card details. There are several systems available to protect against this, but, as yet, no absolutely safe one.

2. The delivery system suffers from all the weaknesses of normal trading and is subject to all the usual delays. Again, several companies are trying to avoid these problems by having their own delivery vehicles or dedicated contracts with specialist carriers.

Another electronic commercial service is **EDI** (**electronic data interchange**) or 'paperless trading'. This means that all the ordering, acknowledging, delivery details and invoicing is done over the Internet. Such systems are becoming increasingly popular as they are efficient and fast and are much cheaper to operate. The speed of completion of a contract gives the company a distinct competitive advantage.

Many businesses, including all the supermarket groups, operate a '**just-in-time'** supply system. By monitoring the flow of items from the supermarket, or other operator, through the electronic till bar-code scanning system, the system will automatically detect when a stock item has reached a predetermined level, triggering an automatic order for more of the item. Through experience, the amount of any one stock item sold over a specified period will be known, and it is therefore a fairly straightforward task to set the restock levels of each item. The advantage for the business is that there is no need for expensive storage facilities. By linking the restock mechanisms into the manufacturers systems, the required items may even be manufactured on a just-in-time system. Such systems are normally known as **VANs** or **Value Added Systems** as they, unsurprisingly, add value to the company. At this stage, you should have realised that there is little difference between these just-in-time systems and intranets. Usually we can say that a just-in-time system is a subsystem of an intranet using an extranet.

The World Wide Web (WWW)

The World Wide Web, or WWW, or just '**the web**, is the whole collection of information pages that can be viewed over the Internet. We can therefore differentiate between the 'Internet' and 'the web', two terms that are often incorrectly interchanged. Whilst the Internet is the network of computers, the hardware, the web is what we actually see on our computer screens.

We saw that the Internet had grown out of the cold war era. The web came along much later, in March 1989 when Tim Berners-Lee proposed a hypertext system for the exchange of documents at CERN, the physics laboratory in Geneva. In 1991, the first web browser was developed. It was called Mosaic and this became the Netscape Navigator browser in 1994.

The web is officially described as a 'wide-area hypermedia information network'. Most of that term is understandable to all of us, but maybe 'hypermedia' needs additional explanation. It is the electronic linking of text, sound and pictures and the ability to jump from information place to another. It also refers to the method used to create the web pages using a hypertext mark-up language, **HTML**. This is a computer language that is used to create the links between web pages and to handle the graphics involved. There are other web languages in widespread use nowadays. **XML**, which stands for **eXtensible mark-up language** has become the standard language of e-commerce and communication as it allows easy transfer of data and documentation between systems that are quite

different from each other. For straightforward documents over the web, the standard language is **Acrobat**, which loses none of the quality of the text during transmission compression. Another useful web language is called **javascript**. This is a useful language for interactive communication across the web and is used in conjunction with HTML. The whole system works through the specification of keywords on the web page created in HTML. The keywords act as tags that are recognised by all web browsers. Having recognised a tag, and the end tag of the section, the browser knows how to display the information between.

Finally on this topic of web languages, the communications protocol or standard used across the web is called **hypertext transfer protocol**, (**HTTP)**. It is this standard that allows web servers to talk to each other. You will no doubt be familiar with these initials from the front end of web URLs or addresses, **http://……….** This specifies the protocol to which pages at the URL conform.

A web URL has the form:

<div align="center">

http:// www. myCollege. ac. uk / filename/ filename

protocol   web page   domain server   domain group   country   extension   extension

the domain

</div>

- '**www**' tells the computer that it is a web page that is required.

- the **domain** indicates which computer the web page request is addressed to. This will display the 'home' page of the web site.

- The **forward slashes** (//)indicate a path to the required file. The extensions are optional, as the domain part of the address will take the user to the correct location. It is then a matter of following the hyper links to the required file. Alternatively, by specifying the file, the user can go direct to the specified file.

In order to access the web we need to use a **web browser**. This is a piece of software that runs on your computer and enables it to connect to the Internet. There are quite a few browsers available, but the most familiar are **Microsoft Internet Explorer** and **Netscape Navigator**. The browser gives dial-up contact with a web **search engine**. This is a another piece of software which accesses an extensive index of web sites and identifying key words within the site web page. We do tend to think of the search engine as a computer, but it is the program that performs the index search on our behalf. Other more well known search engines are Yahoo, Alta Vista, Excite, Look Smart, Netscape, and so on.

We can therefore access the web in two ways. Either by specifying a known URL and going straight to the web page, or by using a search engine to search its indexes for certain words, and then display the URLs of the locations identified. The URLs will be displayed as hyperlinks, or just **links**. This is an HTML tag called an anchor. When users click the mouse over a link on a web page, the system moves immediately to the new location specified by the URL. It need not be an actual URL that is displayed on the web page. HTML allows a user friendly name or phrase to be displayed, but underlying it will be the URL. This seems a suitable point at which to draw the distinction between web pages and a web site. Basically, a **web page** is one displayed page, although we often need to scroll down its full length. A **web site** is a collection of such pages, connected by links. Each web site starts with a web **home page**. This is the introductory page to the site. It will contain a series of links to each of the other pages in the site.

D. INPUT DEVICES

We now have two short sections on what we require for input and output to and from electronic communication.

Keyboard

This is the most familiar, and probably the most essential input device that we use.
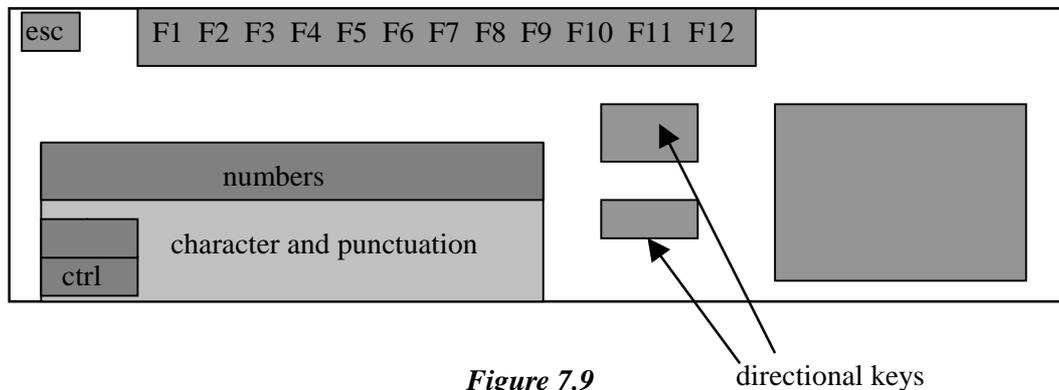
Figure 7.9   directional keys

A keyboard contains a range of numerical, alphabetical, punctuation, symbol and control keys (Figure 7.9). When a key is pressed, an electronic signal is sent to the computer, which then responds by displaying the character, number, symbol or mark on the screen.

As the keyboard is very familiar to us all, I shall concentrate on the main features only.

● First of all, we note that the screen cursor flashes at the exact point where the typed characters will appear. This insertion point can be moved by using either the keyboard arrow keys, or the mouse pointer.

● The main character and punctuation keys are grouped together in the largest part of the keyboard, the typing pad. The top mark and character uppercase are obtained by pressing the shift key at the same time. Uppercase can also be obtained via the 'caps lock' key, but this will not give the upper marks on these keys.   The 'shift' key is duplicated on each side of the typing pad, and is sometimes   shown as an arrow. There is also a control key, labelled 'ctrl' on each side of this pad.

● The top row of the typing pad has the has numbers 0 to 9. There are also a series of symbols on these keys, again obtained by pressing the shift key simultaneously.

● The numeric pad is to the right hand side. There are two symbols on most of these keys, and the top numbers are only activated by pressing 'num lock' first. There are also the arithmetical function keys around the side of this pad.

● The central control pad has the directional arrows to move the screen insertion point, either one space at a time, or a page at a time. The 'home' and 'end' keys will take the insertion pointer to the corresponding part of the displayed document. However, depending on the software being used, the 'ctrl' key may be required as well.

● At the top of the keyboard is a row of function keys, labelled F1 to F12. Each of these performs a special function which may depend on the software being used, but F1 generally brings up a help facility. Others will save, highlight, format etc. What each key does will depend upon the software used. Sometimes it is necessary to press one of the 'ctrl' keys at the same time.

● There are other functions available by pressing combinations of keys simultaneously. These combinations will very much depend on the software being used, and the instruction manual will be required to identify these. However, the most common and useful combination is

'ctrl' + ''alt' + 'del'. This will close the currently running program and is mostly used when the software goes wrong!

● The 'print screen' and 'scroll lock' keys are not used very often with modern software.

● At the top right is an escape key, 'esc'. This will often be used to make an emergency stop of a program.

Although we are quite familiar with the standard keyboard, we must be aware that it is our primary input device. It is through the keyboard that we compile our electronic messages.

Pointer Input

The main pointer input device is the **mouse** (Figure 7.10). This was invented in the 1970s as an intuitive manipulation device. It is generally easier to use than the keyboard for manipulation of items on the screen as all we are expected to do is click and move the mouse.

to the computer
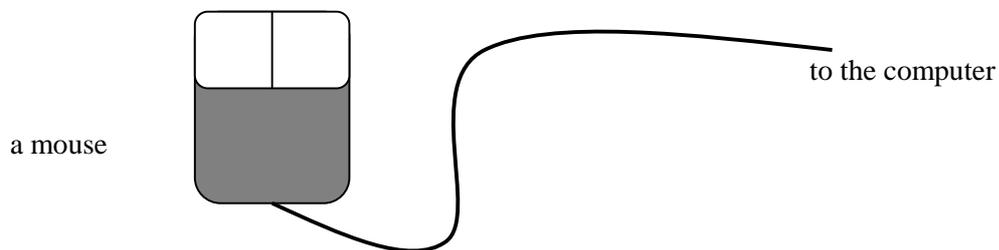
a mouse

Figure 7.10

As the mouse is moved across a surface, a ball underneath revolves correspondingly. This sends a signal to the cursor, which also moves correspondingly.

There are one, two or three buttons at the front of the mouse, and by clicking these, the system will react in specified ways. The left-hand button generally **selects** the items being pointed at by

highlighting them and the right hand button causes a **pop-up menu** to appear. The menu will have various options depending upon what is currently being pointed at. Sometimes a double click is required. The central button is only used for specialised purposes, and the Macintosh computer uses only one button.

When a screen item has been selected, it can be **dragged** across the screen by holding down the left hand button. It is possible to reset the mouse buttons for left handed people.

Notebook computers use a **trackball, track point or touch pad** for pointer input. These are more portable than a mouse. The trackball is like an upside down mouse, and is used by directly rolling the ball. The track point is just a rubber type ball within the keypad and is used by pushing the ball in the required direction. It doesn't actually move; it leans in the required direction. A touch pad is used by touching the pad and dragging the finger across in the required directions. In each case there are separate buttons equivalent to the mouse buttons situated at the bottom of the keypad.

Yet another pointer input device is the **light pen.** This is a light sensitive stylus that can be used to write or draw directly onto a screen. It can also be used to select screen items.

Scanners

This an electronic device which converts text and pictures on paper to a digital format. These can then be stored and displayed by a computer and be transmitted electronically between computers.
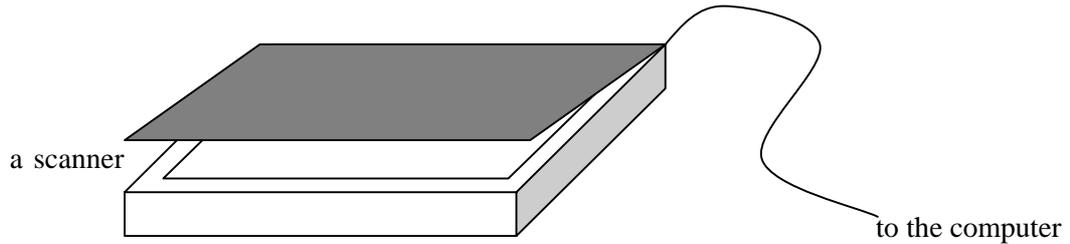
*Figure 7.11*

A scanner generally works in one of two ways.

1. The main one is to **scan** a very bright light across the image and then digitise the reflection obtained. This can then be stored as a file and, when required, merged with text documents.

2. The other way it can be used is as a text character reader, or **optical character reader**, (**OCR**). This is quicker than scanning the whole image, as only the formal text will be recognised. The digitised image is then passed to the designated word processor as a normal document file.

E.   OUTPUT DEVICES

The Monitor

The computer visual display screen or **monitor** is, of course, the principal output medium. Sometimes it is called the visual display unit, or VDU. More or less everything that the computer does is presented in the first place via the screen.

Modern screens use graphic display, or bit-map display technology. This means that the screen is just a matrix of dots or pixels. Everything displayed is made up as a pattern of these pixels. Nowadays we are quite familiar with simple displays on notices using this concept.
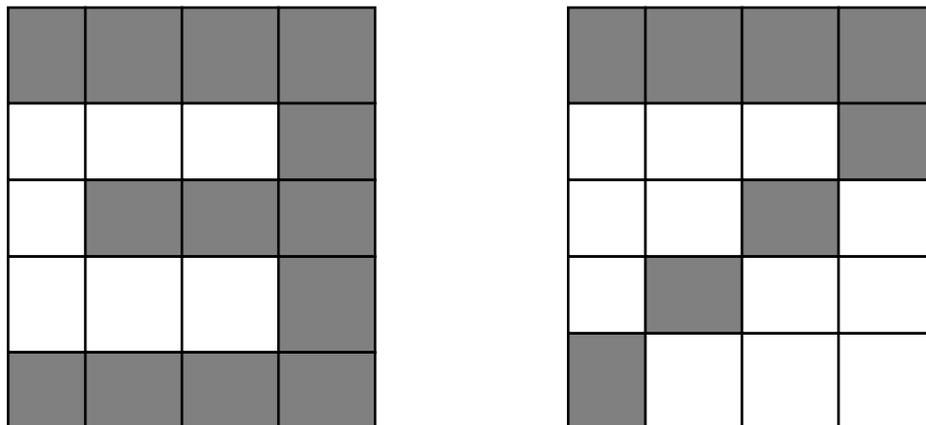

Figure 7.12

Figure 7.12 shows two areas of screen made up of 20 pixels each. By selecting specific pixels I have displayed the number 37. The greater the number of pixels in a specified area, the greater the resolution of the image.

Printers

After the monitor, the most commonly used output medium is the printer.
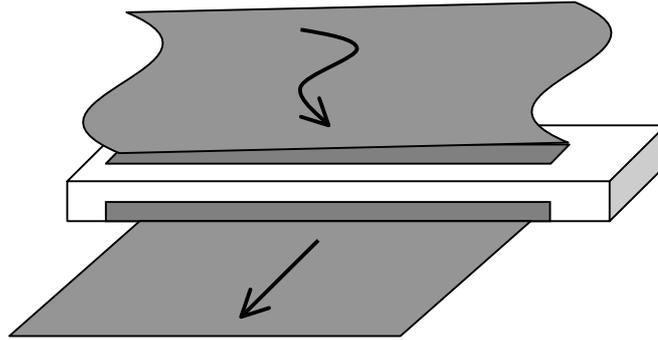
Figure 7.13

The paper is fed in at the top of the printer and emerges from the bottom.

- Most modern PC printers are **inkjet** printers. These squirt black or coloured ink onto the paper to form the image. The normal print rate of such printers is about 4 - 8 pages per minute, which can be quite slow, but the quality is good and they are inexpensive to run.

- Another common type of printer is the **laser** printer which uses the same technology as copying machines. They give very high quality results at high speed but tend to be expensive when compared to ink jet printers.

Human Computer Interaction, HCI

In connection with output, we do also need to look at the important topic of HCI. This refers to the interaction between the computer display and the computer user. In other words, how the display is constructed.

In earlier machines, the display was given in textual form and the peculiar language had to be learned before the user could access the machine. All requirements were input as commands causing this to be known as **command line technology**. Clearly this severely limited the range of users to those who had the time and inclination to learn the command language of the machine. To minimise the difficulty, menus were introduced, listing the available commands. Using the keyboard directional keys, one would chose the appropriate command. Having selected one of the options, this often opens up a further menu, and so on, as seen in the highlighting below

Click first on 'file'

And then on 'save'.

File	Edit View Insert Format
New Open	
Save	
Save As Print	

Whilst this was a considerable improvement, it was still extremely limiting, although all computers still use them for some of the basic functions, again as illustrated above. In 1984, the Apple Lisa computer was introduced with not only pull down menus, but also screen icons accessed via a mouse. This was soon followed by the Apple Macintosh computer and the concept was established. Microsoft followed with the Windows 95 software and now all computers use the principle of windows.

The bases of the HCI concept is that the screen interface should be:

- be intuitive to use in that the icon should suggest its purpose, although a short meaningful name is often attached;

- react to selection, giving the user who clicks on an icon, the appropriate picture, name or explanation. For instance, in Microsoft word software, the printer picture at the top of the screen should start the print operation and not something else such as saving a file;

- show that an expected effect is taking place. For instance, clicking on the icon should either start the operation immediately or some specific operation dialogue panel should appear requesting further action as expected.

This is best achieved by the use of **icons** on the screen. These are small graphical pictures that represent program features and which convey that feature. For example, the telephone symbol or picture or icon could be used to suggest a network dial-up facility within the computer. Any telephone suggests dialling, and so it would be reasonable for a user to expect that selection of this icon will dial some pre-set number of a network computer.

The use of such graphical objects gives rise to the **graphical user interface** or **GUI** (gooies). When used in conjunction with a mouse pointer, their use is intuitive and fast. By pausing the mouse pointer over the icon, a small dialogue box often appears to give further explanation of the purpose.

By selecting an icon and then keeping the mouse pointer depressed, the icon can be dragged across the screen either to another position or so that it is incorporated within some other icon.

A further important concept of HCI is that of **metaphors**. This means that what you see on the screen looks as much like its real world counterpart as possible. For example, a page of a document is set out to look like a real page, and when it is printed out it still looks as it did on the screen. The metaphors we are now all used to are drawn from the world of offices. In fact, Microsoft even call their software Microsoft Office! We are presented with a desktop metaphor on which are arranged document icons, telephone icons, file icons, etc. There is even a waste paper basket called the 'recycle bin' into which we can place any documents or programs that are no longer required. Every so often we are invited to empty the recycle bin.

Study Unit 8

IT and Presenting Information

Contents	*Page*

INTRODUCTION

This study unit is wholly concerned with how we use the computer for the presentation of textual information. We will be concentrating on the use of word processing software and need to look at various aspects of word processing such as formatting, using typefaces, and graphics. We will also look at the use of multimedia and the rules of direct manipulation on the screen interface. Finally we will look at the concept of electronic publishing, including desktop publishing.

At the end of the study unit, you may be able to appreciate the value of personal computing in word processing, desktop publishing, electronic publishing and presenting information.

A.   WORD PROCESSING

Word processing is by far the most popular application on personal computers. All of us use our computers for this purpose and, certainly in the business world, word processing is the main reason for the phenomenal growth of personal or individual computing. There are very few offices where typewriters are still in use, as a simple word processing computer is no more expensive and is far more versatile.

The Software

A word processor is a piece of software. It is not a computer, although many computers are dedicated to being used only with word processing software.

Each word processing package of software is a proprietary package and they differ greatly as a result. However, as we would expect, they do have common features. In some of the descriptions below I am following the style of Microsoft Word.

- The ability to **create** a new documents of several types:

    - Document pages,

    - Letters,

    - Reports,

    - Manuscripts, and others to virtually any requirement,

- An **editing** facility whereby text can be:

    - **Amended** by moving the mouse screen pointer directly to the point at which you wish to edit. This can be the beginning of the particular word or section, or the end of it.

    - **Deleted** by dragging the mouse screen pointer over the word, part of a word or a whole section to highlight it and pressing the erase arrow at the top right corner of the typing pad, or the space bar or clicking on the scissors icon at the top of the screen.

    - **Copied** by highlighting with the mouse pointer and then either clicking on the double page icon at the page top and which has the 'copy' flag which pops up when the pointer is paused over the icon, or by right clicking the mouse and choosing the similar icon and option in the pop-up menu.

    - **Replaced** by choosing from the very top tool bar and in succession edit & replace and then typing into the window that appears the word or words to be replaced and what it is

to be replaced with. Either one occurrence of the word(s) can be replaced or some of them or all of them by choosing the correct options presented in the menu.

● **Moved** from one part of the document to another. To do this, first use the mouse pointer to highlight the word or piece of text, then click on the copy icon (double page picture) and cut icon (the scissors picture). Next move the mouse pointer to the place in the text where the word or piece of text is to be moved to, and click on the paste icon (the clipboard and page picture).

● **Move up and down** the document by either using:

  ● The up-pointing or down-pointing arrows, or

  ● One of the 'Page Up' (PgUp) or Page Down (PgDn) arrows which are quicker when moving across a longish document, or

  ● When going to the beginning or end of a document, simultaneously press Ctrl + Home (or End).

● **Moved from side to side** by highlighting the required piece of text using the mouse pointer and then clicking on the right or left arrow at the top of the page.

● **Saved** by either:

  ● Clicking on the 'tv' style icon at the top of the page, or

  ● Choosing from the very top tool bar, and in succession, File & Save, or

  ● Selecting File & Save As the file either does not have a name as yet or you wish a second copy with a different name. This brings a window up onto the screen and it is necessary to navigate through its sections in order to save the file:

    (a)   in the correct place,

    (b)   as the correct type of file; and

    (c)   with the chosen name.

● **Changed in font** type and size, by selecting either the whole text if the whole document font is to be changed, or a particular word or section of text. The whole text is chosen by using the mouse at the very top tool bar and by clicking in succession Edit & Select All. A particular word or text section is chosen by highlighting with the mouse the word or piece of text whose font is to be changed. Then, in both cases, click on the little arrows to the right of font type and size as displayed at the top of the page and from the drop down menus make the new choices. The exercise can be repeated as often as you wish until a suitable font is decided upon. Some care is required however, as when the font is changed, the whole text will move one way or another as the word processor realigns the new style text to the page. This can cause misalignments at page ends, or around diagrams and so on.

● **Formatted** by choosing from the very top tool bar, Format. The drop down menu presents several options such as changing the case of the character(s), changing paragraph settings such as the line spacings, indentations and text alignment to the left, right or centre, or even a complete change of document style.

● **Numbered and bulleted** either via the Format list of options if the style of bullet or number is not yet set. In this case a window appears with a range of options and settings from which it is necessary to make the appropriate choice. Alternatively if the style of

bullet or number is already set, by clicking on the appropriate icon at the top of the document

- **Underlined, italicised, typed in bold** by placing the mouse pointer within the word, or by highlighting a piece of text and clicking on the appropriate button at the top of the page. These are labelled B, I, U.

- **Word and grammar checked -** options can be tailored to different versions of the language (particularly English) and different grammatical requirements. There is usually also a thesaurus.

- **Word counted** - there is a facility to produce other statistics.

- **Illustrated by inserting graphs and pictures** and wrapping text around in a variety of ways.

- **Reused** after minor editing for the new requirements.

- **Viewed** and proof read prior to printing.

- **Scanned** to **search** for the occurrences of a word or phrase.

The list of features can go on and on as modern word processing packages become more and more sophisticated. The whole strength of word processing and its popular success is its ease of use. This is in part due to the GUI interface used with suitable icons for most of the editing and other features. However, it is also due to the actual features listed above. The compiler of the document can type away happily with no thought to reaching the end of the line, capitalising the first character of a sentence, spelling, consistent, flexible and changeable formatting or any of the hundred and one things we need to bear in mind when typing. The software takes over that kind of responsibility, sometimes automatically, and at other times by prompting and suggesting. For example, the spell checker automatically detects spelling errors, and then suggests a range of correct spellings.

In Figure 8.1, a word processor has been used to:

- Create the initial document page.

- Insert a title box and a title.

- Import a picture into the page.

- Insert a subtitle with a special effect.

- Create a two-column table in the page.

- Fill in the table with a mixture of text, numbers, characters and punctuation marks.

- Number the page, using the automatic page numbering system of the word processor. A 'footer' comment was also added.

  1 'Courier new' font, point 11

  2 'Times New Roman' font, point 9

  3 underlining, italics & bold type

WORD PROCESSING

This page is about Word Processing

It shows that we can select a word, highlight it and edit it by correcting spelling, deleting or moving it	The spell checker automatically corrects spelling errors, and the word processor can be used to `suggest a` range of *correct* **spellings** and formats.
numbers	1,2,300,4000
characters	@ & % $ * >
punctuation	; , / ' [" ! ?

Page 1

example document

Figure 8.1

One of the most popular features of a word processor is the ability to create standard letters and a whole host of documents that can then be constantly reused with different names etc. To help with this there is a **mail merge** facility. This allows a file of names, say, to be merged with a standard letter so that an individually named letters are produced. This is especially useful in offices for mass mailings of promotional material.

B.   DESKTOP PUBLISHING

Desktop Publishing is an advanced form of word processing. It is another software package and publishing system designed for use on personal computers. It provides facilities to create a variety of document types such as letters, envelopes, brochures, magazines, and so on.

There are many tools provided within the package to customise the document to give a professionally finished publication. As well as the normal word processing facilities, there are enhanced features to import diagrams, merge text and pictures, provide colour finishing effects, arrange the pages of a brochure with a choice of folding styles, and many other features (Figure 8.2)
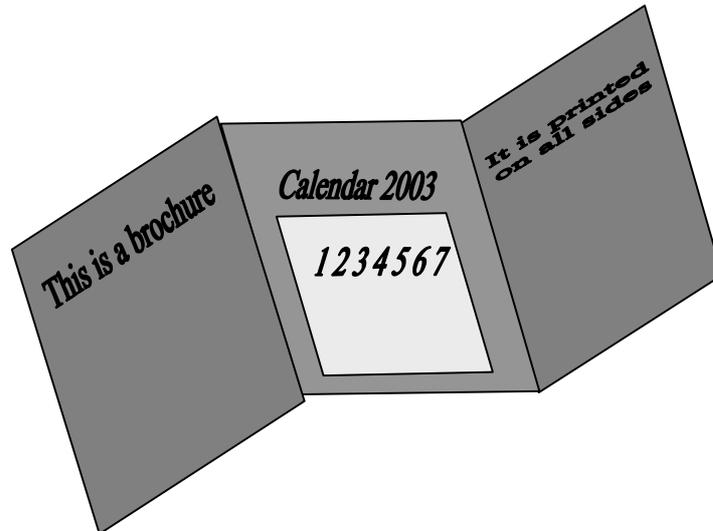
Figure 8.2: A brochure

Desktop publishing packages are used less often nowadays because modern sophisticated word processing packages are incorporating many of their features, this making them redundant. However, desktop publishing is still the best software when producing a magazine or newspaper.

C.   ELECTRONIC OR WEB PUBLISHING

Electronic publishing is a fast growing field of communication. It encompasses almost everything you will have heard of in electronic communication.

By 'electronic publishing' we really mean '**web page publishing**'. This is not quite the same as 'publishing on the web', although this is indeed the main medium used. In fact, there are two media used for electronic publication: -

(1)   The **web**, and

(2)   A **CD-Rom**.

In both cases, the publication is in the form of a web page, and the medium used is whichever is most appropriate for transmission between one person and another. Clearly, where the number of recipients is finite, a CD-Rom is often best. This is also the case if the recipient dislikes the web or is unfamiliar with it. On the other hand, if the number of recipients is infinite, such as with promotional material, then the web is the only feasible medium to use.

By publishing in web page format, a web **browser** will be required for the sender to prepare the publication and for the receiver to read it. In most cases Microsoft Internet Explorer and Netscape Navigator will be the browsers used. The reason for using a browser is that the publication will be prepared in one of the web languages capable of being read across different systems and with a built-in **link** system between the document pages. We have already noted some of the languages used. However, HTML is still the favourite.

The main components of a web page are:

●   A file name for the page

●   **Meta tags**, which are used to activate the browser in some way. Meta tags are used to describe the pages in a few words. They are an opportunity to include some keywords that the search

engines will recognise and use to make your publication known to people browsing the web. This is not, of course, important when publishing on a CD-Rom.

● The actual text and graphics to be included in the page between tags. This will be a title, a picture or graphic, a piece of text and links to other pages.

The first two components are for the use of the system, the only part seen by the recipient or reader of your publication will be the last part. The following picture of a web page shows the introductory or home page. It simply introduces the subject. First of all, the page has a heading. Then a picture is included, as pictures are much better at conveying the subject matter than words. Finally, there are two clear links via buttons, to other web pages.
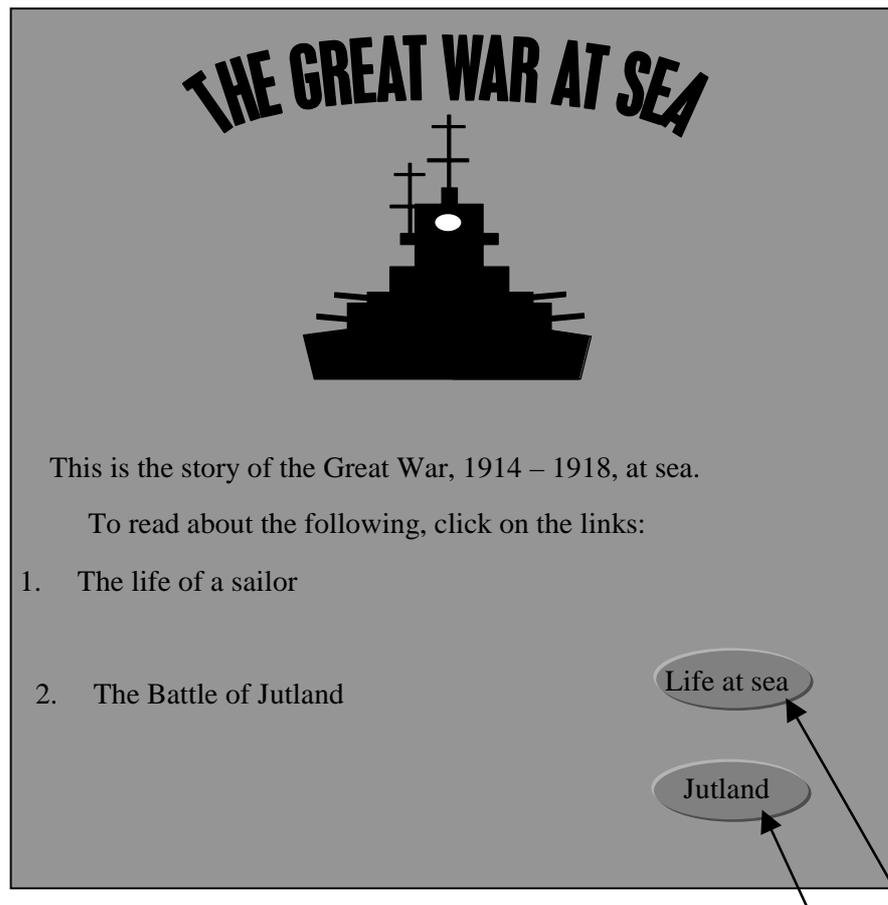
Clicking on the buttons activates the links to other pages

Figure 8.3

Whilst the web page is prepared in HTML language, it is not necessary for the ordinary user to learn such a language. There are many software tools available. Many are included with the word processor package and others are available free from the web. By following the usual menu options, and with very little practice, it is possible to compile a brand new web page in about ten minutes. Once the basic web page has been constructed, it can be edited in much the same way as any document. You will be able to paste in or import documents that you have previously prepared in your word processor. Graphic images, and even sound, can be imported from other stored files, either in your computer or from a CD-Rom.

Once the page has been completed, it can be saved to a CD-Rom or placed on the web. There are software tools available for transferring or uploading, the page onto the web. And again, just follow

the menu suggestions. However, you will need to know the URL (address) of the web server to which you are placing the page. This will be, in most cases, the web server of your ISP (the dial-in contact number you use) or it may be the web server of your Intranet. You will also be required to provide a password that is used to protect the web page so that only the author can change it.

Summary of the Web Page Creation Process:

1   Prepare the document and/or images you wish to be included on your page, using the word processor and other facilities of your computer.

2   Using an HTML editor, write the HTML document. This will give a defined outline of the page, remembering that HTML is actually just a layout language. There are different types of HTML editors, from the simple to the more advanced.

3   Place all the documents and images previously prepared into the HTML document, between the tags. These documents can be edited at any time, once you have found what works and what does not.

4   Load the whole web page into your browser. This will now need to be checked to make sure the page appears as you intended. If not, editing will be required. It is usually a good idea to load the page into several browsers as they each interpret the HTML document differently. You should certainly test both of the main browser types.

5   Having finished the preparation, either copy the web page file to a CD-Rom, if that is what is required, or transfer it to the web server using file transfer protocol (**FTP**) software.

Design of Web Page

The following are a few relevant points but we must always remember that design is very subjective and we all have our preferences. The overriding golden rule is, keep the appearance of the page simple and uncluttered.

●   The page should be easy and intuitive to read and use by the recipient, so that what your communication is effective. Use a simple heading to the page.

●   The recipient should receive as much of the whole communication (page) as possible within the screen area. If scrolling up and down a page is required, whilst keeping it to a minimum, provide easy and obvious ways in which to do this. At the very least a 'return to top' button should be included at the bottom of the page. The recipient should not need to do anything beyond this, other than moving onto other pages in the site.

●   The communication on the page should be meaningful and complete.

●   Graphics and pictures are powerful support to what you wish to say on the page. Avoid complex and moving graphics, as these are slow for the recipient to download. The communication will be ineffective if the recipient does not have time to wait for your fancy design to download to their machine.

These are the main points, but there are plenty of others. As there as many tools and devices for enhancing web page design, it is very easy to overload the page. Your message then gets lost in all the clutter, defeating the whole point of the communication. Before attempting to design a web page and place a communication on it, it is a good idea to look at a wide example of existing pages and decide which you personally like best. The following are ten common mistakes in web design:

1.   **Using Frames**. A technique whereby the visible screen area is broken up into individual, free-standing sections.) Splitting a page into frames is very confusing since frames break up the

visible screen. All of a sudden, you cannot bookmark (save the URL) the current page and return to it as the bookmarks will indicate a frame rather than the page.

2. **Over-use of Bleeding-Edge Technology**. Avoid trying to attract visitors to your site by using the latest web technology. You may attract a few enthusiasts, but mainstream visitors will care more about the usefulness of the content and good customer service. Using the latest and greatest before it is in wide spread use will discourage visitors. Doing so may cause their system to crash while visiting your site and you can be sure that many of them will not be back. Unless you are selling Internet products or services, it is better to wait until some experience has been gained with respect to the appropriate ways of using new techniques. When desktop publishing was young, people over-enhanced their documents: We can avoid doing similar things on the Web.

3. **Scrolling Text and Constantly Running Animations**. Never include components that move constantly. Moving images have an overpowering effect on human peripheral vision. Give your web page visitor some peace and quiet to actually read the text.

4. **Complex URLs**. Even though link addresses like URLs should never be exposed on the screen interface, they should exist. Experience shows that visitors actually try to decode the URLs of pages to infer the structure of web sites because of the lack of support for navigation and sense of location in current web browsers. A URL should therefore be presented in human-readable form using file names that reflect the nature of the information space. Also, visitors sometimes need to type in a URL, so try to minimise the risk of error by using short names with all lower-case characters and no special characters (many people don't know how to type a ~).

5. **Orphan Pages**. Make sure that all pages include a clear indication of what web site they belong to since visitors may access pages directly without coming in through your home page. For the same reason, every page should have a link up to your home page as well as some indication of where they fit within the structure of your information space.

6. **Long Scrolling Pages**. Only a minority of visitors scroll beyond the information that is visible on the screen when a page comes up. Whilst web visitors are now more willing to scroll down a page, and are certainly more likely to do so than to follow a link to the next page in the site, it is important to ensure that all critical content and navigation options are on the top part of the page.

7. **Lack of Navigation Support**. Don't assume that visitors know as much about your site as you do. They always have difficulty finding information, so they need support in the form of a strong sense of structure and place. Start your design with a good understanding of the structure of the information space and communicate this structure explicitly to the visitor. Provide a site map and let visitors know where they are and where they can go.

8. **Non-standard Link Colours**. Links to pages that have not been seen by the visitor are blue; links to previously seen pages are purple or red. Don't change with these colours since the colours have become standardised and the ability to understand what links have been followed is one of the few navigational aides that is standard in most web browsers. Consistency is key to teaching visitors what the link colours mean.

9. **Outdated Information**. Keep your web site up-to-date. Maintenance is a cheap way of enhancing the content since many old pages keep their relevance and should be linked into the new pages. Of course, some pages are better off being removed completely from the server after their expiration date.

10.   **Overly Long Download Times**. Traditional guidelines indicate 10 seconds as the maximum response time before visitors lose interest. On the web, visitors have been trained to endure so much suffering that it may be acceptable to increase this limit to 20 seconds for a few pages. Bandwidth is getting worse, not better, as the Internet adds visitors faster than the infrastructure can keep support.

Study Unit 9

Information Processing

Contents	*Page*

INTRODUCTION

We now move on to the processing of the information prior to transmission. First we must understand the difference between data and information and just what each is. Then we can look at the various tools used for processing. Primarily these will be spreadsheets and databases. However, we will again examine the role of browsers in this respect. And finally, the large topic of information systems needs to be considered, as this is the source of most information available within the corporate environment.

A.   DATA AND INFORMATION

We will begin with two definitions: -

● **Data** are raw facts such as, words, numbers, people, things. By itself, data means nothing.

● **Information** is the meaning we derive from the facts. For example, the number can be a telephone number, the 'people' may be everyone in the building, and so on.

In short, we say,

data = facts

information = meaning

Let us consider an example. It is easiest for us to understand the difference through numbers.

3 and 68 are just a pair of numbers and with no further explanation, they will for ever remain a meaningless set of numbers.

But, if we put these numbers into the context of this course, we then understand them to be a reference to Study Unit 3, page 68, the Unit on 'Writing Articles'. Within this context, the bare facts that are two numbers, become information conveying a reference to the reader.

Data is stored in the computer. This is important. You will recall that everything is stored in the computer as a digitised number in the form of 1s and 0s, i.e. in binary code. This is so whether it is a word, a number, a picture, a sound or anything at all. These 1s and 0s by themselves are meaningless to us. For example, can you tell what the following represents?

10101010 11001100 11110000

Even if you decipher the digitised groups into their normal number equivalent, they still do not tell us anything. And so, to repeat, it is data that is stored in the computer.

You might then ask: 'Where is the information in that case?' And the answer is that the information is nowhere until we supply it.

An example will best help us examine the concept of information: -

We will start with the following simple series of numbers: 100100

The first thing for us to do is to ask: -

1.   Why were those particular numbers chosen?

2.   Is there a familiar pattern or format?

3.   What do they mean?

My answers, in order, would be:

1. No particular reason as another six digits could equally have been chosen.

2. Yes.

3. I'm not saying at this stage.

In other words, I know what I intend them to mean but at this stage you do not. Even if you have made a guess, you cannot be sure.

As the numbers stand, they do not tell us anything with confidence. They convey no meaning, and therefore no information to us. We have arrived back at the definition.

Of course the representation need not be numbers. For instance:

> baa baa

could be another representation of the same information.   It still tells us nothing with certainty. Examining the two data representations: 100 100   baa baa

We can think of each as a further encoding of the other. In other words they are the same thing.

The possible meanings conveyed to us could include:

1. The number one hundred thousand and one hundred.

2. A date. But is it the 10th January 2000, or the 1st October 2000 as expressed in the North American style?

3. The binary equivalent of the number we normally give as 36. This is the numbering system used inside computers.

4. The sound made by a sheep.

5. Musical notes in series as for the tune 'Three Blind Mice'.

6. Any others you may have thought of.

To choose the correct option from these we need to know the **context** in which the data is presented. Each of the options can be correct within its own separate context. We can now say that to fully understand a piece of information we need to interpret the data representation within a previously understood context.

This has a knock on effect on our understanding of information however. For an example we will further consider the option number 3, above, which shows the binary numbering system used inside computers. If you are one of the many who do not know what 'binary numbers' means, then the data representation is still just data to you. No information is conveyed. We can say that what is information to one is usually just data to another.   So all representations are both data and information at the same time and it depends upon a context and further understanding to turn data into information

One final note about data. It is common to use *data* for both singular and plural forms, although data is the Latin plural of datum.

B.   GATHERING AND ORGANISING INFORMATION

As mentioned above, we will now discuss the collection of information and its organisation into a presentable form.

Spreadsheets

A spreadsheet is a piece of software that presents a grid on the screen and into which we can enter numbers and apply calculations and formulae across the grid. The following is a simple outline of the page display presented by spreadsheet software.

	A	B	C	D	E	F	G	H	I
1									
2									
3									
4									
5									
6									

Cell A1
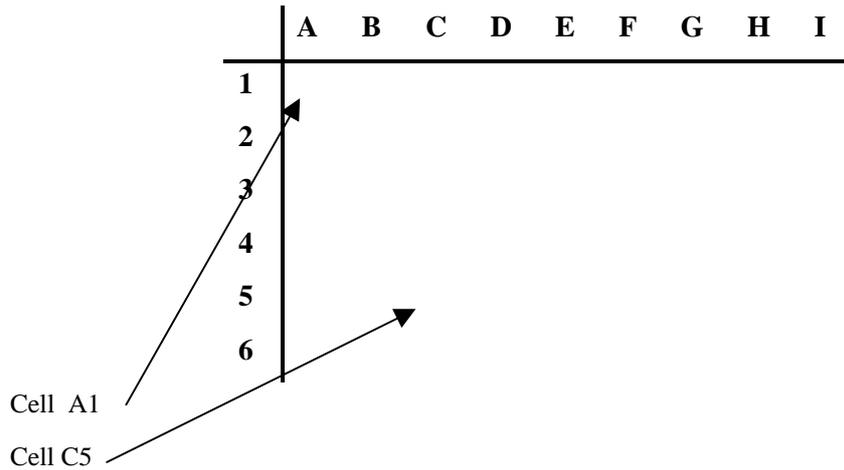
Cell C5

Given that any specific cell can be directly referenced, it is possible to insert all sorts of cross references in the spreadsheet page. Thus, if cell D4 contains the reference A1, then both cells will contain the same data. In addition, any change made to cell A1 will also be copied to cell D4.

Page before change

	A	B	C	D
1	80			
2				
3				
4				A1

page after change

	A	B	C	D
1	100			
2				
3				
4				100

  Cell D4 references A1. Therefore, a change in A1 will be copied to D4.

This is a very powerful facility, especially as formulae and calculations can be included in the references.

Two examples using a calculation in the first sheet and a formula in the second

	A	B	C	D
1	10	23	21	17
2	9	21	18	24
3	0	12	20	13
4	15	16	18	**65**

	A	B	C	D
1	10	23	21	17
2	9	21	18	24
3	0	12	20	13
4	15	16	18	**54**

(B1+C3+A2+D3) = (23+20+9+13) = 65   sum(D1 to D3) = 17+24+13 = 54

There are many formulae possible in each of the spreadsheets that are available. And these are applicable to data such as text, numbers, dates, financial and, statistical figures, and so on. As well as entering values into the cells, we can include labels.

	A	B	C	D
1	income	1000		
2	expenses	200		
3	profit	800		
4	Tax at 20%	160		
5	Profit after tax	640		

(B1 – B2)

(B3 * 0.2)

(B3 – B4)

Spreadsheets are particularly useful in evaluating **'what if'** scenarios. This is a facility much used in decision support systems whereby the decision-maker can input different values to a projected scenario, and then examine the range of outcomes.

First, the spreadsheet is set up with various data trails, as required.

In the following example, using the basic Table 1, with formulae, we get Table 2: -

Table 1

	A	B	C	D	E
1	if	x	=	10	
2	and	y	=	20	
3					
4	then	z	=	D1+D2	
5					
6				gives	5*D4
7					
8	and			result	E8

Table 2

	A	B	C	D	E
1	if	x	=	10	
2	and	y	=	20	
3					
4	then	z	=	30	
5					
6				gives	150
7					
8	and			result	150

Table 3

	A	B	C	D	E
1	if	x	=	20	
2	and	y	=	20	
3					
4	then	z	=	40	
5					
6				gives	200
7					
8	and			result	200

Table 4

	A	B	C	D	E
1	if	x	=	40	
2	and	y	=	20	
3					
4	then	z	=	60	
5					
6				gives	300
7					
8	and			result	300

Table 5

	A	B	C	D	E
1	if	x	=	80	
2	and	y	=	20	
3					
4	then	z	=	100	
5					
6				gives	500
7					
8	and			result	500

Table 6

	A	B	C	D	E
1	if	x	=	160	
2	and	y	=	20	
3					
4	then	z	=	180	
5					
6				gives	900
7					
8	and			result	900

And, by sequentially doubling the value of x, the result, which started at 150, becomes 200, 300, 500 and 900 etc. In other words, a simple doubling of the basic value, x, results in a doubling of the increase in the result.

$x = 10$ result = 150

$x = 20$ result = 200 — Increase = 50 — 50 to 100 = 100%

$x = 40$ result = 300 — Increase =

$x = 80$ result = 500 — Increase = 200 — 100 to 200 = 100%

$x = 160$ result = 900 — Increase = 400 — 200 to 400 = 100%

However, the actual result increase is by a lesser percentage than the x increase of 100%. The figures are: -

$x = 10$ to $x = 20$, result increases from 150 to 200, that is, by 50, which is 33.33% of 150

$x = 20$ to $x = 40$, result increases from 200 to 300, that is by 100, which is 50% of 200

$x = 40$ to $x = 80$, result increases from 300 to 500, that is by 200, which is 66.66% of 300

$x = 80$ to $x = 160$, result increases from 500 to 900, that is by 400, which is 80% of 500

A decision would have to be made on the understanding that although doubling the initial input value, which could be a production input, does not give a corresponding doubling of the output. This exercise not only shows the usefulness of the 'what if' facility in spreadsheets, it also emphasises that the spreadsheet is no more than a support tool in decision making. The personal judgement of the decision maker is still very necessary.

Out of interest, you may be thinking that if we were to continue the exercise just a little further we would achieve a doubling of the result figure. Should you try the calculations, you will find that this is never so!

Another very useful spreadsheet facility is the creation of charts or graphs. There are many styles available and it is quite easy to choose the most appropriate for some situation by examining the menu of styles presented and the illustrative examples provided. When using the Microsoft Excel spreadsheet, the chart menus are accessed by clicking on the button with the coloured column chart icon.

Using the following example spreadsheet which expands the earlier profit calculation over several years, we can show some examples of the corresponding charts. As charts are a picture, they are much easier for people to assimilate and to understand a changing situation as we have in our example.

First, the spreadsheet (Table 7).

Table 7

	A	B	C	D	E
		1998	1999	2000	2001
1	income	1000	1500	900	1200
2	expenses	200	300	150	250
3	profit	800	1200	750	950
4	Tax at 20%	160	240	150	190
5	Profit after tax	640	860	500	760

The first two charts are both column charts. Figure 9.1 is a cluster column chart, while figure 9.2 is a stacked column chart.

	1	2	3	4
■ income	1000	1500	900	1200
□ expenses	200	300	150	250
■ profit	800	1200	750	950
□ Tax at 20%	160	240	150	190
■ Profit after tax	640	960	600	760

Figure 9.1

|	1	2	3	4
■ Profit after tax	640	960	600	760
□ Tax at 20%	160	240	150	190
■ profit	800	1200	750	950
□ expenses	200	300	150	250
■ income	1000	1500	900	1200
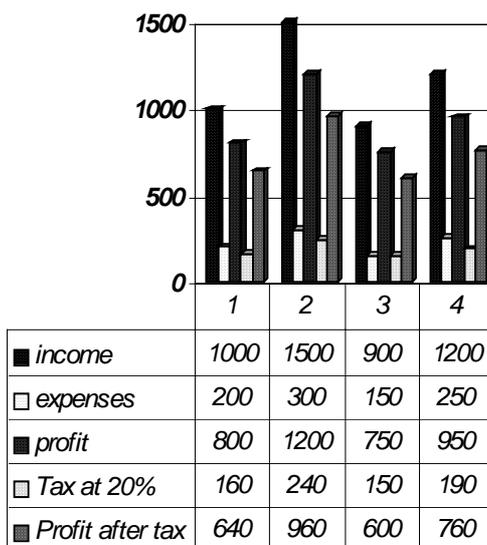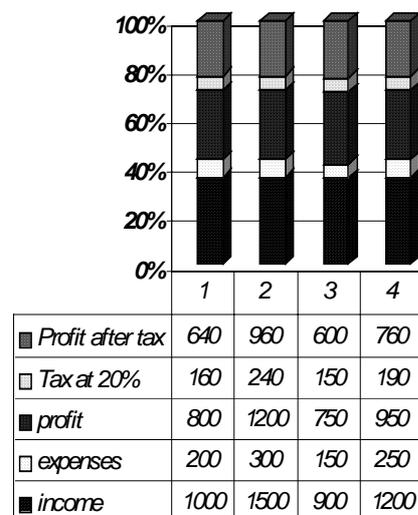
**Figure 9.2**

Next are two pie charts. Figure 9.3 is a standard pie chart and figure 9.4 is an exploded pie chart.
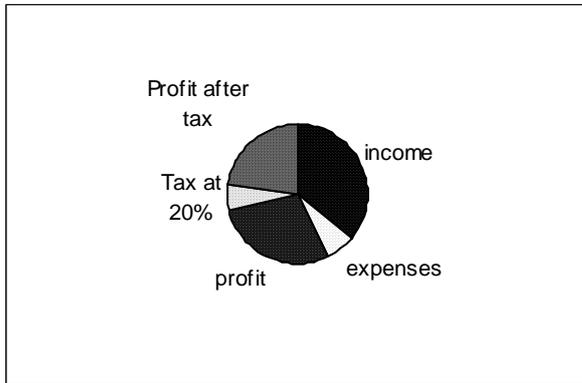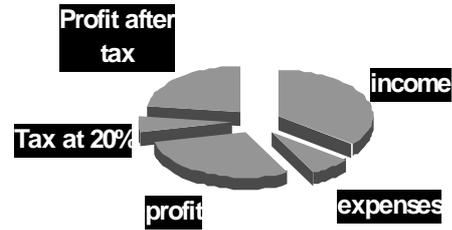
Figure 9.3   **Figure 9.4**

And finally we have a line chart (Figure 9.5).
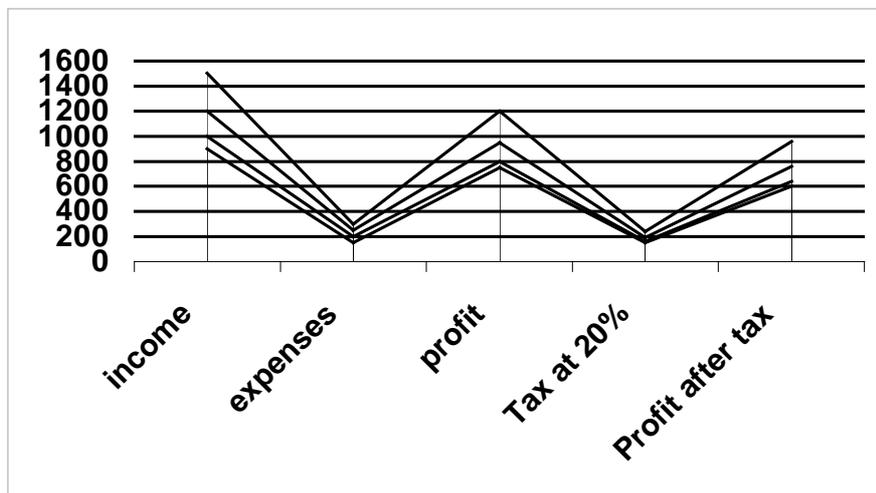

Figure 9.5

Each of these charts shows the same information in a different style. The style chosen will depend on what information we want to highlight and that we feel shows this aspect off best. This is a subjective choice and we will each have our preferences. The important point, as always, is that the communication must be successful. To achieve this, simplicity is always the best course to take.

Databases

Databases dominate all of today's computing activities. There are databases at the root of nearly all systems, and their number is growing fast. So, the first question we need an answer to is, 'What is a database?'

A **database** is a single store of data files. The files are stored in a structured form and each data item is, as far as is possible, stored once only. The database is capable of being used by many users simultaneously and each of these users can use the database in a number of different ways.

This is quite a long definition, but it boils down to saying that a database is data stored in one place and it can be used by many people in many ways.

There are different types of database. But most modern databases and all small system databases are a type called **relational databases**. This just means that the data is stored in a series of tables. A table is

called a **relation**, hence the type of database. The following two tables are examples of relations. There is little that is special about them. However, the columns are labelled and, within any one relation, there are no duplicate rows.

Table 8

Car

Type	Model	Colour	Reg No
Ford	Mondeo	Black	S123 ABC
Peugeot	406	Green	J54 XYZ
Rover	45	Black	Y344 DEF
Vauxhall	Astra	Red	X43 JJU

Table 9

Student

Name	Number	Age	Car Reg
G Smith	3456	25	X43 JJU
N Black	2345	37	S123 ABC
R Thomas	4563	22	J54 XYZ
A Brown	2534	51	Y344 DEF

The above tables are two examples of relations as they could be held in a database. Each relation has a name and each has several named columns. Each row is equivalent to a stored record.

You may also have noticed that each table has a column with the same values within it, although the columns are labelled differently. That is the car registration columns. This indicates that there is a **relationship** between the tables.

A relationship such as this gives the user of the database flexibility in accessing the data, and so helps the database comply with the requirement of being able to be used in a variety of ways.

Worked Example 1

Suppose we need to know the type of car owned by a particular student. By following these steps, we can find the car.

1. In Table 9, we access the Student's name, and number if it is known. Suppose this student is R Thomas.

2. The third row of Student relation tells us that R Thomas has a car with registration number J54 XYZ.

3. Access the Car relation with this registration number.

4. The second row of this relation tells us that the particular car is a green Peugeot 406.

Therefore we now know that R Thomas drives a green Peugeot 406, registration J54 XYZ.

Worked Example 2

This time we want to find the owners of all the black cars in the car park.

1. In Table 8, we find that rows 1 & 3 have details of black cars, registration numbers S123 ABC & Y344 DEF.

2. Using both of these values, obtain the details of rows 2 & 4, in Table 9 giving students N Black & A Brown.

All sorts of similar queries can be asked of the database. The language used for this work is known as **Standard Query Language** (**SQL**). SQL has virtually monopoly on database use. The good news is, again, that we do not need to learn the language as there are many software tools on the market which enable us to access the database via a series of window displays and by clicking on various screen buttons.

The database is controlled by a very complex piece of software known as the **Database Management System** (**DBMS**). All users access the database through the DBMS.

The DBMS performs a number of functions:-

● It controls who is allowed to access the database by using different passwords and authorisations. Once a user has been granted access, they will need to produce further passwords to gain access to different parts of the database. This is both a security mechanism and it protects the privacy of the data. For example, the company payroll department needs to know the detailed salaries of all employees, but few other personnel need this information. Therefore it is protected from general access.

● It controls the data being entered into the database by performing a series of checks to ensure the data conforms to the required format, is a reasonable value and not, say, having a month 13 date, is not already stored, and so on.

● It processes the data being retrieved from the database as in our two worked examples above, although further processing of the results may occur elsewhere,

● It maintains a log of who accesses the database and how and how often it is used.

And there are many other specialist functions that the DBMS performs.

Each user accesses the DBMS in one of two ways: -

(1) By making a direct query as in our queries above,

(2) Through a special application program.
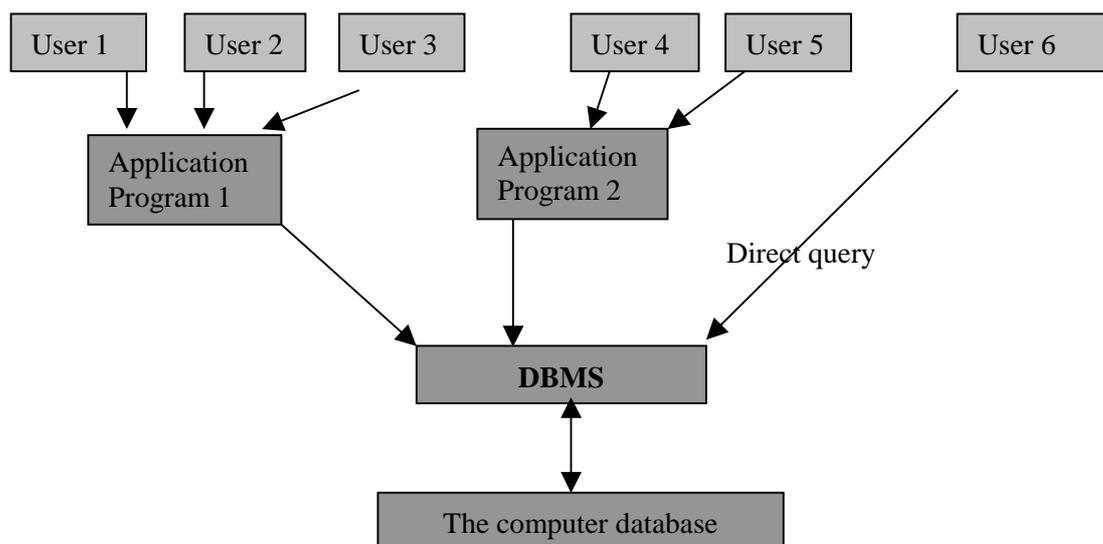
Figure 9.6

In Figure 9.6,

● Three users access via the first application program. These users are all making similar use of the database and so may all be in the same company department.

● Two users use the second application program,

● One user has direct access to the DBMS via a standard SQL query.

If the same query is to be made many times, greater efficiency is obtained by writing an application program. If the query is an ad hoc query, then a direct SQL query will be most efficient.

Databases store millions of individual pieces of data. As far as possible, each is stored once only as that when a value is updated, as this needs to be done in one place only, then the integrity of the data is ensured. Where it be necessary to have more than one copy of a data item, then there must be simultaneous updating of each copy of the item. In our illustrative relations above we stored the registration numbers in two places so that we could have a relationship.

Information Systems

An **information system** is a computerised system that provides information. However, that definition is much too simplistic to be of use to a company. The system must be capable of providing information that is both **reliable** and **timely**.

Virtually all companies use an information system of some kind. At its simplest, as people in the company go about the business of the company, they generate data. For example, the production department generates supply needs, finished product numbers and maintenance requirements and schedules. It will also generate data on personnel work schedules, hours worked and personnel required. Other departments generate similar data. All this data is stored in the corporate database.

It is then made available to those with the authority to access it so that other activities of the company can be efficiently completed. For example, whilst the production department generates the hours worked by each individual worker of the department, it is the payroll department that will retrieve the data from the database to calculate the wages of the workers. There is no need for paper to be used and a record of the hours is readily available.

Communication of information around the company is through the common database.

Management Information Systems (MIS)

One of the principal uses of a company information system is to provide management with reliable and up-to-date information on the performance of the company. Furthermore, management at different levels will have different information requirements. We will start with an outline of the main management structure (Figure 9.7).


Executive level management

Strategic or middle level management

Operational or lower level management
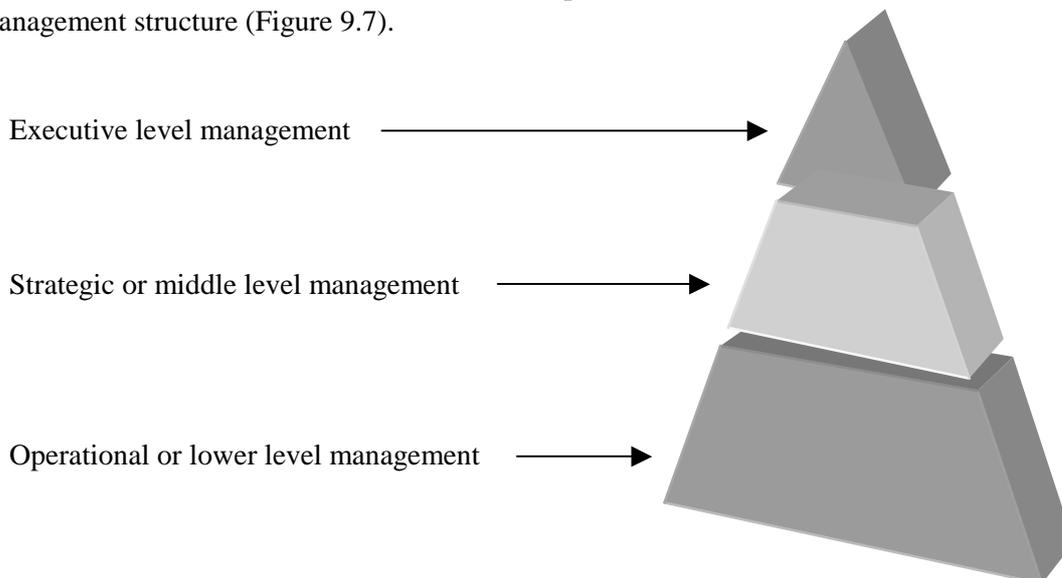
Figure 9.7

The **operational** management will require information in the form of a **detailed report**. This would contain details such as a full production list and schedule, detailed sales figures for each sales person and so on. This information is used for supervisor purposes.

Strategic level management require information in **summary report** form. For example, the report may contain a summary of the sales for the previous month, a summary of the supply flow over the previous three months, and so on.

Executive level management also require summary reports, but over a longer time scale. The report may contain the production figures for the previous year or projected half-yearly profit figures, etc.

All management will be provided with **exception reports**. These are generated by the system whenever something goes wrong or something strays outside previously prescribed limits.

To produce these reports, the MIS will extract the relevant data from the database, sort it and process it and it will then present the data in some prescribed manner.

A **Decision Support System** (**DSS**) is a special type of MIS.   As its name suggests, it is intended to help decision-makers with their decision. We have already examined one of the tools used by a DSS when we discussed spreadsheets and the 'what if' scenario. As well as a spreadsheet, the DSS will have a statistical tool, which can be used to discover trends in the data. A DSS has the facility for the manager to call up the summary data and to then directly manipulate it.

As we noted before, it is most important not to think of the DSS as being a tool that make decisions. It is a support tool, as there is no substitute for an experienced manager who can bring many other skills and judgements to the decision making process.

You may also come across mention of **Executive Information Systems**, (**EIS**). This again, is a special version of the MIS. It is intended to help the executive level managers analyse long term trends and to build a strategy for the company to move forward.

Data Warehousing

Data warehousing is a more recent development, but its popularity is growing very fast.

A data warehouse is like the database of the MIS, but it is historical and so has a time factor built into the data. The operational MIS processes vast amounts of data, but once it has been processed it is discarded. The data warehouse imports data resulting from the processing of all the different transactions. As this data comes from a number of different systems, assuming the company is large and spread over several sites, it arrives at the data warehouse in many formats. These are collated to a common format and then stored in the data warehouse. And there it stays. As a result, data warehouse data is very stable.

It is then possible for the data to be analysed at leisure. One technique is known as **knowledge discovery.** This involves trawling through the data using a further technique called **data mining,** which looks for trends in the data. Largely supermarkets use this, as they search for people's shopping patterns. They may look for the pattern of late night or young men shopping, and patterns for other identifiable groups.