

Stepping Up to the Plate: Developing an Effective Business Communication Strategy

Strategic and persuasive communication techniques can help professionals become significantly more effective at selling their initiatives and obtaining management support.

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Virtually everyone reading this article is in sales, regardless of title or responsibility. How? Because selling, essentially, is communicating persuasively to get others to take some action, which is what all business professionals are engaged in most of the time.

Gaining support for a records and information management (RIM) program (or any project, for that matter) requires more than sales skill, though. It requires an effective communication strategy, and that is dependent on having the ability to:

1. Show staff – particularly senior managers and IT professionals – how the initiatives will help them meet their personal needs
2. Establish professional credibility
3. Be persuasive

Meeting Personal Needs

One of the most important principles of persuasion is that people will tend to go along with you if they believe that doing so will fulfill their personal needs. Among people's basic needs are to: 1) be secure, 2) win, and 3) be accepted. Here is how those needs can be exploited to gain support for initiatives.

The Need for Security

Because security often plays a critical role in senior executive decisions, it should be addressed first. The following example shows how a records manager for a food manufacturer used that knowledge to help win a project that saved his company substantial money:

The records manager puts together

a business case to help protect the company against superfund problems. (A superfund site is a toxic site requiring clean-up mandated by the Environmental Protection Agency.) The records manager basically told senior management, "This records program will cost you \$10,000, but it will help you sleep at night knowing that the company is protected against superfund claims."

For management, the issue was that the organization had a mass of boxes containing insurance contracts that protected the company against future insurance claims. However, the contracts had not been indexed or inventoried. After implementing the records program and indexing the files, the company was sued for superfund cleanup. Fortunately, be-

cause of the records project, the company was able to locate a contract from 1942 that held it harmless. Therefore, the insurance company had to pay the fines, ranging from \$4 to \$5 million. The records manager had the communication skill to sell the program by knowing the owner's pain point – security – and articulating it well enough.

The Need to Win

The need to win is also important to consider in communication. The concept is fairly simple and intuitive: Someone who makes others feel like winners will be far more persuasive. One way to accomplish this is to give colleagues and clients more than they expect. For example, if a records manager is trying to promote acceptance of a document imaging program, instead of just discussing such benefits as the ability to more easily find, index, and dispose of documents, arrange a live demo of an imaging system for key executives. This will give them more than they expect and be more persuasive.

Another way to make people feel like winners is to avoid disagreeing on unimportant issues. Many projects (e.g., new program implementations or technology upgrades) experience major delays caused by resentments and failure to reach agreement over relatively minor issues. Another approach is to compromise early and often.

The Need for Acceptance

The value of recognizing the principle of acceptance can be illustrated by a manager who wants to hire someone to support the records management program. The manager suspects her boss is hesitant to agree to the hire because he's concerned about what his boss, the chief operating officer (COO), will think.

In this case, it might not be enough for the manager to say she will take responsibility for the new hire's performance because this doesn't address

her boss's need to be accepted by the COO. The manager could offer to have the COO also interview the candidate – even though the COO's approval for the hire may not be needed – as a way to help her boss secure the COO's personal acceptance.

Being Credible

In his book *Making Good in Management*, Clarence B. Randall stated: "The leader must know; must know that he knows; and must make it

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abundantly clear to others that he knows." This is an excellent definition of credibility. In addition to "knowing," credible leaders must also be competent and trustworthy, which are two important characteristics affecting persuasiveness.

Competence

Most professions require a wide variety of skills, and mastering all of them can take years. So, those who are not competent in some areas can do two things to gain those competencies.

First, they should take advantage of the many courses and resources offered by relevant organizations to study and perhaps complete certificates or earn certifications.

Second, they can gain "team competence" by working with others who have practical experience and can help them grow in specific areas. For example, someone who wants to expand the company's RIM program with the addition of a radio frequency identification system, but doesn't have much practical experience in this area, can

team with someone who does, either internally or with an outside provider, to implement the program.

Trustworthiness

Trustworthiness counts when it comes to establishing credibility. Two ways to be trustworthy are by:

1. Being consistent. It is difficult to trust someone who seems to have integrity at work but then cheats and is impossible to deal with on the golf course.

2. Not gossiping or saying negative things about others. Does anyone trust a business colleague who constantly complains about others behind their back? Probably not.

Being Persuasive

To be persuasive, presenters must know their company's overall strategic objectives. Not all do. When records managers at a recent seminar were asked to write down their company's mission statement, 90% of the participants couldn't do it. No one can be persuasive with senior executives responsible for funding projects if they don't know where the company is going.

Communicating persuasively can make a huge difference in getting important target audiences, including senior management, middle management, and IT personnel, to accept records management proposals and act on them. Being persuasive also incorporates elements of the other two already-mentioned abilities and involves three new elements to consider:

1) understanding strategic communication, 2) telling a story, and 3) presenting with power.

Understanding Strategic Communication

“Strategic communication” needs to be distinguished from “expressive communication.” Many people mix up these two forms of communication, which is a huge mistake when it comes to being persuasive.

Expressive communication basically is used to express feeling and is

3. Will my message be resisted? (“Yes; the company has other priorities.”)
4. What do I know about my audience that will help me tailor my message? (“I know they don’t want to be exposed to legal liability for failing to meet compliance and other regulations. So I can help them understand the program’s importance by looking at actual examples of what happened to companies that did not implement adequate records retention schedules.”)

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egocentric by nature. It’s talking to a friend or business colleague, not necessarily requiring them to do anything other than listen. It’s “telling,” not “selling.”

Strategic communication is purposeful. It’s based on the desire to influence someone to do something, whether it’s to buy a product or consider a project proposal. It’s “selling,” not just “telling.”

Strategic communication is also more challenging, requiring speakers to listen and tailor their message to their audiences. Many people are not trained in strategic communication and, therefore, rely too much on expressive communication.

Communicate strategically by keeping four questions in mind:

1. What am I trying to achieve? (“I want to get management to approve implementing a records retention schedule.”)
2. How will my audience react to what I am trying to achieve? (“They probably won’t listen because right now they don’t think it’s important.”)

Telling a Story

Story telling can be one of the most creative and enjoyable aspects of communicating strategically. Storytelling generates an experience and stimulates emotions by using symbolism and metaphor to help overcome resistance to the underlying message.

Virtually every form of business communication – in the hands of the right person – can be a form of storytelling. This includes an annual report, a resumé, or a PowerPoint presentation. Case histories are one of the most potent and persuasive forms of business storytelling.

For example, here’s one actual case history that had all the elements of a good story. It had a:

- Main character (a university)
- Goal (improving records management)
- Obstacle (hundreds of thousands of disorganized student files that accumulated over 100 years)
- Resolution (implementing a document imaging solution that made student records available online, dramatically improved turnaround

time, and reduced storage space and the risk of misfiling physical records)

Here’s an example of how video can also add to the persuasiveness of the story:

A large retailer discovered that its sales executives were not following the company’s customer returns policy. A project team organized to review the situation went to stores, gathered a mountain of evidence, and presented it to management with charts, graphs, and statistics. No one paid much attention.

The team then bought a cheap camera, went to stores, and filmed interviews with eight sales reps about the company’s return policy. The reps offered eight totally different versions of the return policy. The grainy, unprofessional video cost about 5% of the time and effort that the rest of the analysis did, but it had a profound effect on the management team, which immediately launched a major effort to fix the problem.

The point is that “seeing is believing.” A video of eight people telling different stories was more powerful than reams of data.

Presenting with Power

Mastering everything highlighted above won’t mean very much to someone who freezes up or is otherwise ineffective when presenting to a boss, department, senior management, or industry group. While advice on this topic can easily fill a separate article, following are a few tips on developing the ability to present with power.

Practice. Keep in mind that it takes time. Most accomplished people have dedicated many years of hard work to become world class presenters. Or, as Mark Twain is often quoted as saying, “It usually takes more than three weeks to plan a good impromptu speech.”

Understand the audience. Imagine what it is like to be in the audience’s shoes. Audiences will be more recep-

tive if they believe the presenter has spent the time to consider their point of view.

Be credible and competent. This particularly applies to presenting with power. Someone who has mastered the subject of the presentation, as well as the physical elements of presenting (e.g., gestures and vocal variety), will be a powerful force on stage.

Have an opening, a body, and a conclusion. Don't read or memorize the presentation. Practice, instead,

enables ideas to be embedded in the nervous system, freeing the speaker to engage the audience and express feelings.

Understand audience attention span. Remember that audience attention fades after about 20 minutes. If a presentation is scheduled to go longer, consider incorporating elements, such as storytelling, that will help keep the audience connected.

Getting the Job Done

Many times senior management

resists projects that don't generate revenue or directly cut costs. So, when it comes to promoting the need for a records retention schedule, for example, the chances are it will take a persuasive, powerfully presented argument to sell it. But, following the advice above will help you hit it out of the ballpark! **END**

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