COMMUNICATION QUICK GUIDE

This guide is provided in order to assist you as you prepare your written and spoken work product. While the information provided is quite concise, we hope you will find it helpful. More detailed information is provided in the College of Business Communication Standards Manual. Detailed guidelines for proper techniques for citation and formatting are also provided in the Publication Manual of the American Psychological Association (APA).

Writing Tips

To produce good writing, you have to make the information fit the document and style that best communicates to your readers. Successful writing does not just happen; it is the product of careful planning, research, organization, writing, and revision. Because you can find plenty of information on research at http://www.library.ohiou.edu/find/ and revision will be covered in the next section of the Communication Quick Guide, the focus in this section will be on checklists to aid you in planning, organizing, and writing your business report.

Planning Tips

- Establish your purpose (What do you want your readers to know or to do?)
- Identify your audience (What does your audience already know or believe?)
- Determine your scope of coverage (How much detail does your reader need?)

Organization Tips

- Choose the best organizational pattern for your reader (direct or indirect...consider your audience’s initial reaction to the topic)
- Outline your notes and ideas (Include citation information and indicate which information you are quoting or paraphrasing as you take notes to avoid plagiarism later in the writing process.)

Writing Tips

- Select an appropriate point of view (First, second, or third person)

  **First Person:** I scrolled down to find the settings option.

  **Second Person:** You must scroll down to find the settings option. **OR**
  Scroll down to find the settings option. [You is understood.]

  **Third Person:** They scrolled down to find the settings option.

Use the **direct approach** when your audience is eager/interested/neutral

Use the **indirect approach** when your audience is displeased or resistant to change
Use effective sentence construction (Make sure that sentences convey the meaning that you intend.)

- On average avoid sentences over 40 words or fewer than 10
- Use single-word substitutes instead of phrases whenever possible (now instead of at this time).
- Construct effective paragraphs (In reports, paragraphs should be no longer than 7-9 lines. Paragraphs in letters and memos should rarely exceed 4-5 lines.)

Use an active voice (Active: analyze, Passive: make an analysis of)

Integrate quotations and paraphrasing (Use introductory phrase such as: As Davis has noted, According to Smith, or Johnson contended.)

Use transitions to maintain your paper’s flow. For example:

<table>
<thead>
<tr>
<th>However</th>
<th>In contrast</th>
<th>As a result</th>
<th>Consequently</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finally</td>
<td>Furthermore</td>
<td>For example</td>
<td>Therefore</td>
</tr>
<tr>
<td>Next</td>
<td>Then</td>
<td>While</td>
<td>Until</td>
</tr>
<tr>
<td>First</td>
<td>Likewise</td>
<td>After</td>
<td>Because</td>
</tr>
</tbody>
</table>

Write an effective introduction (The introduction should include an attention grabber such as an appropriate quotation or story, a purpose statement, and a preview statement of what will be covered in the document.)

Write a strong conclusion (interpretation of facts and other information) and/or recommendation (suggests a course of action)

**Conclusion:** On the basis of its track record, I conclude that Wallzone is an attractive purchase.

**Recommendation:** I recommend that we buy Wallzone at a 15 percent premium over its current market value in the next ten days.
Persuasion Tips

Persuasion, the attempt to change an audience’s attitudes, beliefs, or actions, is a key skill for business students to master. Although all of the basic writing tips still apply, there are several additional considerations. The AIDA model can be particularly useful in persuasive writing. (Adapted from Bovee and Thill’s *Business Communication Essentials* (3rd ed.), p. 233.)

### Attention
Get the reader’s attention with the benefit of your ideas that is of real interest or value to them.

### Interest
Build the reader’s interest by further explaining benefits and appealing to their logic or emotions.

### Desire
Build desire by providing supporting details and answering potential questions.

### Action
Motivate the reader to take the next step by closing with a compelling call to action and providing convenient means for the reader to respond.

Stephen Toulmin’s model is another method for organizing persuasive methods.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Make your claim (a statement that is debatable or controversial.)</td>
<td>The federal government should ban smoking.</td>
</tr>
<tr>
<td>2.</td>
<td>Qualify your claim if necessary.</td>
<td>The ban would be limited to public places.</td>
</tr>
<tr>
<td>3.</td>
<td>Present good reasons to support your claim.</td>
<td>Nonsmokers are endangered by others’ smoke.</td>
</tr>
<tr>
<td>4.</td>
<td>Explain the underlying assumptions that connect your claim and reasons.</td>
<td>Citizens are entitled to protection from harmful actions by others.</td>
</tr>
<tr>
<td>5.</td>
<td>Provide evidence.</td>
<td>Cite the incidents of deaths attributed to secondhand smoke.</td>
</tr>
<tr>
<td>6.</td>
<td>Anticipate possible counterarguments.</td>
<td>The suggested ban applies only to public places; smokers could still smoke in private.</td>
</tr>
</tbody>
</table>

**Additional Tips**

- Don’t offer new ideas or recommendations for change until your readers are prepared for them.
- Your credibility influences your readers to accept or reject your proposal (Use credible resources and know your information).
- Make your opinion and/or recommendation clear.
- Place your strongest points last if your audience is very interested in the topic; first if the audience isn’t as interested or open to your ideas.
- Testimonials (personal stories) are most effective if they come from people with whom the readers already associate.
Avoid using extreme or sensational claims and facts.
Remember that most people are more open to small, gradual changes than life altering plans.
Consider a cost-benefit analysis (The benefits to your readers need to outweigh any costs associated with adopting your idea and/or plan).
Avoid fallacies (errors in reasoning that negatively weaken an argument).
Use graphics such as tables and graphs to help convey your point.

Proofreading Tips

Think of proofreading as quality inspection. It is your last chance to make a good impression on your audience with a well-constructed, well written document. You should read and re-read your paper several times; each time looking for a different element (format, content, or mechanics). Use perceptual tricks to ensure that you read what you actually have typed rather than what you believe you have typed such as reading pages backward, using your finger or a sheet of blank paper to read word for word, and reading the paper aloud.

3 Step Proofreading and Editing Process

1. **Proofread and edit for accuracy of format**
   - Have you included all necessary parts? (Depending on the document: title page, table of contents, introduction, body, conclusion, reference page, appendices)
   - Is your layout consistent? (Fonts, white space, margins, headings, hanging indentation, lists, page numbering, headers, footers, graphics)

2. **Proofread and edit the content**
   - Do you have a clear thesis statement?
   - Is the tone and voice of your message appropriate for your audience?
   - Is your message concise? (Does each idea support your thesis?)
   - Is your message clear? (Are your ideas presented in a logical order?)
   - Is your message complete? (Have you fully supported and developed your ideas?)
   - Is your message credible? (Have you used a variety of credible sources? Is your draft free of plagiarism?)
   - Open and closing: Do the opening and closing emphasize your thesis and key points?
   - Call for action: Will your reader know what action he/she should take and what deadlines apply (if any)?

3. **Proofread and edit for mechanics**
   - Errors in wording (look for redundancies, outdated phrases, overly general wording, and negative terms)
   - Errors in grammar and structure (look for errors in placement of modifiers, use of active and passive voice, use of parallel structure, pronoun/antecedent agreement, and “stacks of nouns.”)
   - Errors in spelling and punctuation (make sure quotation marks, brackets, dashes, and parentheses come in pairs)
   - Run the spelling and grammar check and use the online thesaurus to improve word choice (remember NO automated system catches all errors!)
**Citations**

The College of Business requests the use of the Publication Manual for the American Psychological Association (APA) for documenting research sources.

**APA Documentation Resources:**

Citation, simply put, is giving credit for ideas and words where credit is due. Without proper citations, you are guilty of plagiarism, which is a serious academic and professional offense. According to Diana Hacker, three different acts are considered plagiarism:

1. **Failing to cite quotations and borrowed ideas**
   
   
   Given that apes’ brains resemble those of our human ancestors, the cognitive foundations on which human language could be built are already present.

   **Plagiarism:**
   
   Because apes’ brains so closely resemble those of our human ancestors, it is logical to assume that the cognitive foundations on which human language could be built are already present.

   **Acceptable use:**
   
   Noting that apes’ brains resemble those of our human ancestors, Leakey and Lewin (1992) argued that in ape brains, “the cognitive foundations on which human language could be build are already present” (p. 244).

2. **Failing to enclose borrowed language in quotation marks**
   
   **Original Source** (Linden, “Animals,” 1986, p. 57):
   
   No animal has done more to renew interest in animal intelligence than a beguiling, bilingual bonobo named Kanzi, who has the grammatical abilities of a 2-1/2-year-old child and a taste for movies about cavemen.

   **This is plagiarism because an idea that is not commonly known is being used without giving credit to the idea’s creator.**

   **Plagiarism is avoided because the original authors are given credit and word-for-word phrasing is placed in quotation marks.**
Plagiarism:
According to Linden (1986), no animal has done more to renew interest in animal intelligence than a beguiling, bilingual bonobo named Kanzi (p. 57).

Acceptable use:
According to Linden (1986), “no animal has done more to renew interest in animal intelligence than a beguiling, bilingual bonobo name Kanzi” (p. 57).

3. Failing to put summaries and paraphrasing in your own words

If the existence of a signing ape was unsettling for linguists, it was also startling news for animal behaviorists.

Plagiarism:
David (1986) observed that the existence of a signing ape unsettled linguists and started animal behaviorists (p. 26).

Acceptable use:
David (1986) observed that an ape with the ability to use sign language was a development that surprised both linguists and animal behaviorists.

To avoid plagiarism, ask yourself:
- Is quoted material enclosed within quotation marks (unless it has been set off from the text)?
- Is each quotation mark word-for-word accurate? If not, do brackets or ellipsis dots mark the changes or omissions?
- Are summaries and paraphrases written in your own words, not copied or half-copied from the source?
- Has any material that is not commonly known been documented?
- Is each source material used included in the list of references?
Quick APA Guide

As discussed above, whenever you use another person’s ideas or words, you must give that person credit. APA uses in-text citations to immediately acknowledge the author of the source material while a reference list is a complete list of source materials used, located at the end of the paper.

In-Text Citations
APA’s in-text citations provide at least the author’s last name and the date of publication.

Example: One study found that 17% of adopted children in the United States are of a different race than their adoptive parents (Peterson, 2003). Or Peterson’s (2003) study found that 17% of adopted children in the United States are of a different race than their adoptive parents.

Example with 2 authors: One study found that many women do not negotiate their salaries and pay raises as vigorously as their male counterparts do (Babcock & Laschever, 2003). Or Babcock and Laschever (2003) have suggested that many women do not negotiate their salaries and pay raises as vigorously as their male counterparts do.

For direct quotations, summaries, and paraphrases, a page number is given as well.

Example: “The techniques used in group therapy can be verbal, expressive, or psychodramatic” (Weinberg, 2000, p. 5). Or Weinberg (2000) has claimed that “The techniques used in group therapy can be verbal, expressive, or psychodramatic” (p. 5).

Reference List
The reference list in APA is the alphabetical list of works cited within the paper. Reference lists should:
- Begin on a new page at the end of your paper
- Have the title References centered one inch from the top of the page
- Use a hanging indentation (first entry line flush with left margin, indent any additional lines 5 spaces)
- Be alphabetized by author’s last names. When a work has no author or editor, alphabetize by the first word of the title other than A, An, or The
- Author’s last names should be inverted (last name, first initial)
- Abbreviate page as p. and pages as pp.
- Break a URL after a slash or before a period (Do not insert a hyphen)
Commonly used references

Article in a Journal

Article in an Online Periodical

Article in a Newspaper

Book: Two or More Authors

Nonperiodical Web Document

Web site

Additional APA Citations Reminders
When using quotations in your paper, keep in mind the following APA rules:
- Use ellipsis marks (…) to indicate that you have shortened the quoted passage by omitting words
- Use brackets ([ ]) to insert your own words into quoted material
- Set off quotes of forty or more words by indenting the quoted material five spaces from the left margin

APA Headings
Headings are used to maintain flow within your paper. Headings are placed as follows:

- Fifth-level Headings: Centered, all uppercase
- First-Level Headings: Centered, upper and lowercase
- Second-Level Headings: Centered, italicized, upper and lowercase
- Third-Level Headings: Flush left, italicized, upper and lowercase
- Fourth-level headings: Indented, italicized, initial capital only with a period
The easiest way to decide where you should use a heading and which heading you should choose is to create a report outline like the one shown below. Doing so will help you organize your topics and their importance within your paper. The following outline will demonstrate which level of heading to use:

**Report Title**
- **Introduction**
- **Recommendations for Strategic Growth**
  - **Growth within the United States**
  - **Expand to the West Coast**
    - **Surveys indicating market potential**
    - **Data of current competitors on the West Coast**

Fifth-Level Heading: Given that you only have one title, this should be the only fifth level heading.

Second-Level Headings: These are your thesis statement broken down into main points.

Third-Level Headings: These support your main points.

Fourth-Level Headings: These do not offer new ideas, but lend additional support to your argument.

First-Level Heading: This of these as your thesis ideas.

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***Depending on the length of your paper and your instructor’s preferences, you will not always use all 5 levels of headings. The following chart will show you which heading levels to use when all 5 levels are not needed.***

<table>
<thead>
<tr>
<th>Number of Levels Needed</th>
<th>Heading Levels to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>One level needed</td>
<td>Use First-Level</td>
</tr>
<tr>
<td>Two levels needed</td>
<td>Use the First and Third-Levels</td>
</tr>
<tr>
<td>Three levels needed</td>
<td>Use First, Third, and Fourth-Levels</td>
</tr>
<tr>
<td>Four levels needed</td>
<td>Use First, Second, Third, and Fourth-Levels</td>
</tr>
</tbody>
</table>
Report Format

APA Paper Format Guidelines
APA prescribes the following paper format guidelines. Please check with your instructor for any preference he/she may have.
- Page numbers in the upper right hand corner
- Running head (a shortened title followed by 5 spaces and the page number)
- 1 inch standard margins

Title Page

The above segments can be arranged differently depending on the purpose of your report and your instructor’s preferences.

What’s in a Report?

<table>
<thead>
<tr>
<th>Short Report</th>
<th>Formal Report</th>
<th>Schematic Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title Page</td>
<td>Title Page</td>
<td>Title Page</td>
</tr>
<tr>
<td>Executive Summary</td>
<td>Executive Summary</td>
<td>Executive Summary</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>Table of Contents</td>
<td>Table of Contents</td>
</tr>
<tr>
<td>Introduction</td>
<td>Introduction</td>
<td>Introduction</td>
</tr>
<tr>
<td>Body</td>
<td>Body</td>
<td>Body</td>
</tr>
<tr>
<td>Conclusion</td>
<td>Conclusion</td>
<td>Conclusion</td>
</tr>
<tr>
<td>Appendices</td>
<td>Appendices</td>
<td>Appendices</td>
</tr>
<tr>
<td>References</td>
<td>References</td>
<td>References</td>
</tr>
</tbody>
</table>

The above segments can be arranged differently depending on the purpose of your report and your instructor’s preferences.
Letter of Engagement

The letter of engagement may be your first written correspondence with your client; remember first impressions matter. It is equally important to remember that the letter of engagement is part of your contract with your client and must specifically state what services you will and will not be providing for your client as well as when these services will be provided and what, if any, follow-up services you will provide. The letter of engagement should include:

**Paragraph 1**
- Goodwill statement
- Purpose and preview
- Identifies the client
- Agent with authority needs to sign

**Paragraph 2**
- Defines purpose and objectives of consulting project
- Must realistically define scope of project and contents of client deliverables (do not include internal documents such as the team contract)
- Defines expectations of client (timely information, regular communication, etc.)

**Paragraph 3**
- Limits the scope of the agreement if necessary to clarify objectives

**Paragraph 4**
- Identifies how the objectives will be met
- Outlines deliverables and schedule
- Identifies date all project deliverables are completed and presented

**Paragraph 5**
- Refers to a separate document (i.e. Schedule of Fees)

**Paragraph 6**
- Conclusion
- Recap purpose and summary of contents
- Pleasant forward thinking tone
- Reminds client to sign and return letter
Letter of Transmittal

The letter of transmittal presents your report to its intended audience (in a book this section would be called the preface). Think of the letter of transmittal as the conversation that you would have with your audience (client, boss, etc.) if you were handing the report directly to them. Your letter should have a personal but professional tone to it.

**Introduction**
- Title (in italics) and the purpose of the report
- Who the report was written for
- Authorization (who authorized the project, when)
- Show how the report has met your objectives or how your objectives have changed

**Body**
- Briefly mention methods (How did you arrive at your results? i.e. did you conduct a survey, interview leaders in the field, research competitors?)
- Give an overview of your results, point out the main results or point out surprising results/findings
- Focus on conclusions of final report (What were your major findings?)
- Focus on summary of recommendations (What are your 3 most important recommendations?)

**Conclusion**
- Acknowledge assistance you received (Was someone in the client’s company particularly useful? Did you have assistance from a community member? Did you seek the assistance of faculty or other personnel on campus?)
- Offer to assist with interpretation
- Offer to assist with further work (For example, are you willing to help develop the website you proposed your client developed?)
- Make a call to action (recommendations)
- Add personal comments (goodwill close)
Scope Documents

The scope document is a general term for any document that refines and defines the requirements aspect of the triple constraint of time, cost, and requirements. In this general sense, it provides an overview of what the project is supposed to accomplish and clarifies how those accomplishments will be achieved. It may also provide the team members, customer, and project manager with insight on what is specifically not in the scope.

Application

The scope document is used as a tool to minimize disputes over what is and is not included in the project. It is not only used to clarify the project’s objectives for project organization and the customer, but also for team members and between management and the project manager. Because visions about how a project may be carried out frequently differ, the scope document serves as the unifying tool for those visions.

Content

The scope document is an expanded version of the scope statement, with far more extensive information. It normally incorporates much of the same information as the scope statement, with expanded detail on stakeholders, requirements, deliverables, features, long-term use/application, and administrative requirements. The outline for a scope document may include the elements discussed in the following subsections.

1.0 Introduction/Background

This would include the history and any environmental definitions required to understand the project in general terms and to understand the remainder of the document.

2.0 Rationale/Business Opportunity

As a cross-reference to the business case, this component expresses the advantages of moving ahead with the project and why it was undertaken. The location of the original business case should be included here.

3.0 Stakeholders and End Users

This will list both business areas and individuals, citing their responsibilities, involvement, and any responsibilities or deliverables they may generate associated with the project.

4.0 Project Details

This will sometimes be broken out into the functional requirements for the project and the technical requirements. In some instances, the scope statement may only include the functional requirements. It should incorporate all of the mandatory requirements from the contract or memorandum of understanding, and should incorporate detail on the features of the deliverable that will serve those requirements.
5.0 Administrative Requirements
Because administrative responsibilities can be almost as onerous as project deliverable responsibilities, they should be clearly defined as components of the project scope. The information should be included on required meetings, reports, and support for the life of the project.

6.0 Post Project Considerations
Because the project effort normally makes up only a small component of a total system life cycle, any long-term considerations that will directly affect the project decision-making process should be incorporated in the scope document. This may include many of the assumptions that will be made regarding long-term application.

Approaches
Although the scope statement is generally confined to a few paragraphs or pages, the scope document may be a far more substantial document. It captures information from a variety of sources and places it in a single repository. As an alternative, it may largely be a document that provides reference to other documentation in other locations (specifically identifying those locations and the information embedded in that documentation).

Considerations
Because most of the information included in a scope document can be found in other project documentation, some organizations may choose to forego this document. The only advantage to having a separate scope document is that it provides a single storage area for information that may otherwise be housed in far-flung locations.
Executive Summary

The executive summary is an overview of another document or presentation. It provides the audience with enough clear information that he/she can make an informed decision on the basis of this document. The executive summary must be able to stand on its own, if necessary, in conveying key points, recommendations, and conclusions.

Executive Summary Structure

<table>
<thead>
<tr>
<th>EXECUTIVE SUMMARY</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose, direct overview, and major recommendation(s) of the document being summarized</td>
<td>General statement of the major focus</td>
</tr>
<tr>
<td>Key evidence</td>
<td>Major supporting evidence</td>
</tr>
<tr>
<td>Key evidence</td>
<td></td>
</tr>
<tr>
<td>Key evidence</td>
<td></td>
</tr>
<tr>
<td>Closing summary and reiteration of major recommendation(s)</td>
<td>Closing: conclusion and recommendations</td>
</tr>
</tbody>
</table>

Remember:
- The executive summary should be short and as complete as possible.
- The suggested average length is one single-spaced page, but the summary can extend to two pages (the rule is 1/10 the length of the document).
- References are never cited within the executive summary.
- The reader should be able to make a decision based only on the executive summary.
- Use appropriate headings throughout the executive summary to guide your reader through the document.
- Follow the order of the original as closely as possible.
An introduction paragraph provides the purpose of the memo and outlines the topics to be covered. Preview the main points and/or recommendations in all but single topic memoranda. The guidelines on this page show and tell you one professional way to format a memorandum that utilizes topic headings.

**Subject Line**
Use the subject line above to forecast or summarize the memo's contents. A clear, concise subject title helps readers to focus on the subject and to gauge its importance. A precise heading also makes filing by subject easier. Capitalize each word in the title except for articles such as “a” and “the” or prepositions such as “of.”

**Topic Headings**
When discussing a number of subtopics related to your subject, include headings (as illustrated in this memo). Headings help you organize, and help readers locate information quickly. For a review of appropriate placement and style of topic headings, refer to page nine of this document.

**Format**
Do not indent the first line of paragraphs. Use single spacing within paragraphs and double spacing between paragraphs. Although some organizations require different formats, a standard includes 1” margins, Times New Roman, 12-point font, and left justification. A line that separates the address block from the text is optional and is used in this memo for decorative purposes.

**Memo Verification**
Do not sign your memos. When sending a hard copy, initial the "FROM" line after your name to verify that you are the sender.

**Organization**
Organizing the content of your memo is as unique as the assignment and your writing style. In general, you should strive for maximum reader friendliness. Using a logical system of organization (e.g. chronological, problem-solution, sequential) will help your reader understand the information.
Voice and Tone
Voice is the level of formality you use to address your audience. Tone is the level of formality and the emotion displayed. For most informal writings, you may use first and/or second person voice (reference to “I” and “you”). Second person voice is used throughout this informal memo. Third person voice is the best choice for formal writings because it makes the text sound more objective. In all writings, strive for professional tone.

Second Page Header
If your hard copy memorandum exceeds one page, include a header on the second and subsequent pages. A header should be placed in the page header and by right justified. It should include an abbreviated version of the memorandum subject and the page. An example of a second page header is provided below.

Your Name
Short Subject
Page 2 of 2

Conclusion
A conclusion paragraph is needed to tie the memo topics together and, when appropriate, to ask for action and/or create goodwill. Recap the purpose and review the main points for all but single topic memoranda. For short memoranda, it is not necessary to label the conclusion paragraph with a separate topic heading; however, for longer memoranda, it may make the information more accessible to the reader.

References
Attribute direct quotes, paraphrased material, and borrowed ideas to their original authors or sources. Use American Psychological Association (APA) format for citations. Add an alphabetized list of references (bibliography style) immediately follow the concluding paragraph, with a references topic heading as is shown here.
Scope Document Template

Company Name Project Scope

Client: Business Name

Contact Name: Client Name

Contact Information: Address Line 1

Address Line 2

Phone

Email

Purpose:
The purpose of this document is to define the scope of the project, outline tasks to be completed by the Integrated Business Cluster Students (CLUSTER), and establish expectations of the project for both the Company (Abbreviation) and the CLUSTER in Ohio University’s College of Business.

Description:
If the business is an existing entity: In paragraph form, give general business information such as name of business, owners/managers and their roles/responsibilities, line of business and scope of products and services, mission/vision if established, and the geographic region in which they do business.

Also give business’s legal structure and brief business history to show that you have an understanding of their past. This should also state what the pain/problem is that the client is facing.

If the business is a start-up: In paragraph form, give general business idea information such as owners and their roles/relevant experience, line of business and scope of products and services, mission/vision, and the proposed geographic region in which they’ll do business.

Also give the proposed legal structure and what initiatives have already been completed in starting the venture. This should also state what the pain/problem is that the client is facing – whether it be securing financing and/or establishing feasibility.

Assistance Provided:
CLUSTER has determined in coordination with Abbreviation that the development of a Type of Deliverable and what it will help solve for the client. This needs to specifically state how the work we are doing will alleviate the pain/problem the company is facing. This will specifically include:
• Describe individual sections of the deliverable in their own bullet point. State what the purpose is of that section. For example one of the bullet points could state “An operational analysis describing the company’s current operational activities and any changes necessary to reach growth goals.”

• The next could state, “A competition analysis describing other companies providing X service in the area and potential competitive advantages of this company’s service.”

Expectations:
The CLUSTER will provide assistance to Abbreviation, but requires complete disclosure and cooperation. In order to successfully complete this project, the CLUSTER has the following expectations from Abbreviation:

• Engage in frequent communication with the CLUSTER throughout the development of the aforementioned analysis. Be specific about communication expectations i.e. “This entails that Abbreviation will respond to emails within 48 hours” or “This entails a conference call with CLUSTER staff once a week for 30 minutes,” etc. If these guidelines are not met, this could extend the timeline of the project and/or postpone the project.

• Complete ... List items that you expect your client to do for the project.

• Provide... List items that your team needs from the client to complete the aforementioned deliverables. This could include: product and pricing information, customer lists and expenditures by type of customer, growth goals, financial statements including material costs, overhead expenses, and profit and loss statements, etc.

• Provide follow-up information to the CLUSTER about the success and/or hurdles that the company is facing after project is completed. This information will be solicited by the CLUSTER if needed, and is to help support continued funding of this free technical assistance.

Timeline:
Date of initial meeting – Proposed date for final deliverable. Propose to your project manager an internal action plan stating interim deliverable dates, and then work on firming up a timeline with your project manager.

If communication guidelines are not met, this could extend the timeline of the project and/or postpone the project.

*Please note that the areas highlighted in yellow are what needs to be customized for your client and project.
Presentation Tips

Writing an excellent report is only half the challenge in most classroom and client situations; you must be able to orally communicate your ideas as well. The following is an outline for an informative presentation. The outline can be modified depending on the amount of time the speaker has as well as how many main ideas the speaker wishes to convey.

Presentation Outline

Introduction
1. Attention getter (A quote, a startling statistic, relevant story, or rhetorical question)
2. Introduction of self and/or team members
3. Purpose (Thesis statement)
4. Credibility (Why are you a credible source?)
5. Link to audience (Why is this topic important or relevant to your audience?)
6. Preview (What are the main points you are going to cover; make sure your preview order matches your presentation order!)

(Transition)

Body
1. Main Point
   A. Explanation
   B. Support
(Transition)
2. Main Point
   A. Explanation
   B. Support
(Transition)
3. Main Point
   A. Explanation
   B. Support

Conclusion
1. Signal close (i.e. In conclusion)
2. Review main points
3. Restate purpose
4. Impact: Memorable Close (a quote, a startling statistic, relevant story, or rhetorical question)
**Tips for Success**
- Audience analysis (Know to whom you are speaking and adapt your message accordingly)
- Organizational pattern (Organize your speech in a logical and appropriate manner)
- Use citations throughout (e.g., According to Smith, President of AMCO)
- Keep audience’s attention with variety (link to audience needs, clear/descriptive language, examples, stories, statistics)
- Rhetorical questions (For most impact, wait 1-2 seconds after a rhetorical question before continuing to speak)
- Use visual aids (You are the message, visual aids should enhance you)
- Use PowerPoint effectively
- Practice delivery with visual aids
- Anticipate Q&A
- Consistent eye contact
- Variety of appropriate gestures
- Relaxed tone and delivery pace
- Vocal variety (Avoid a monotone voice)
- Remember if you do not convey interest in your topic, your audience won’t either!

**Tips for Confident Speaking**
- Practice, practice, practice
- Think positively and visualize success
- Approach the speech as a conversation with your audience
- Breathe
- Concentrate on your message
- Find the friendly audience members
- Don’t highlight mistakes

**Handling Question and Answer Sessions**
- Anticipate questions
- Seek clarification (Repeat or paraphrase the question)
- Respect audience members and their questions
- Goal oriented answers (Focus on your answers on the purpose of your presentation)
- Don’t rush into a response (Think BEFORE you speak)
- Address entire audience (Initially make eye contact with the questioner then move your gaze to other audience members)
- Summarize long answers (Keep answers concise whenever possible)
- Follow-up with your audience (e.g., Did that answer your question?)
- Never argue with your audience
Visual Aids

Effective PowerPoint

- Give a speech, not a slideshow (You should be the center of attention, not your PowerPoint)
- Practice your presentation with PowerPoint to minimize technical glitches
- Have a back-up plan in case the technology fails
- Talk to your audience, not the screen
- Only use PowerPoint slides when they support your message (insert blank screens into your presentation when slides aren’t necessary)
- Use contrast between the background and text colors

Inappropriate PowerPoint Slide

![Inappropriate PowerPoint Slide]

Improved PowerPoint Slide

![Improved PowerPoint Slide]

Other Visual Aids

Presentation aids include props and models, graphs, charts, video, audio, and multimedia. Select the aid, or combination of aids that will illustrate your speech points most effectively. Use your presentation aids to supplement rather than to serve as the main source of your speech ideas.

- Visual aids should be appropriate for your audience
- Consider the size of your audience (a 4X6 photograph works well in a small group when you can pass it around but loses its effect with a larger audience)
- Cue audio or videotape to the appropriate segment before the presentation
- Pass handouts out either before or after the presentation; never during
- Remember the eight by eight rule (don’t use more than eight words in a line or more than 8 lines on one slide, poster, etc.)
- Choose fonts and colors wisely (colors do have meaning, some fonts are easier to read than others)
- Be cautious of overusing boldface, underlining, italics, pictures (too much can be distracting)