IFMA's Communications Course

Student Guide

IFMA™

Acknowledgments

IFMA's professional development courses – including our world-class credential programs, the FMP®, SFP® and CFM® – are the cornerstone of our industry-leading offerings for career advancement. The contribution of IFMA volunteer members is critical to the relevance and value of our educational programs. The result of their global input is learning for facility managers, by facility managers. We would like to acknowledge the cumulative hours and expertise our members have contributed to educational content development and review, from design through delivery, ensuring that IFMA's Communications Course accurately reflects the body of knowledge and skills required of facility managers in today's global business environment.

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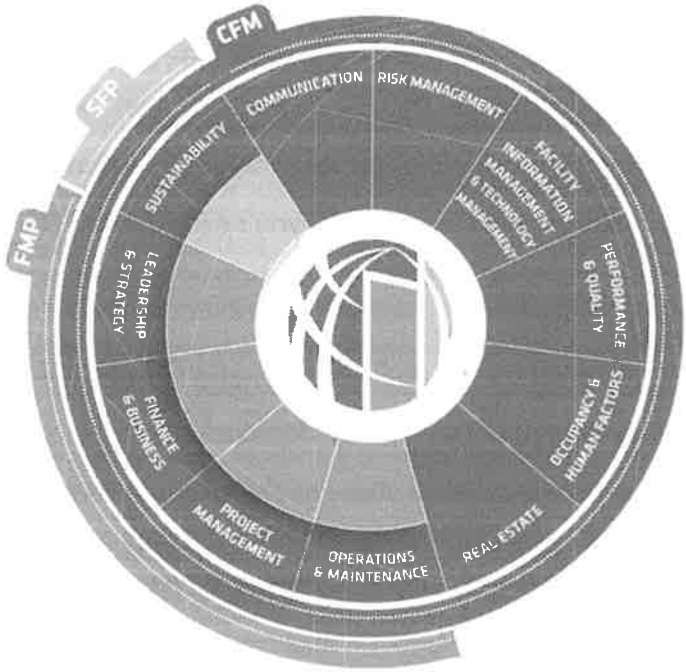
IFMA Credentials

About IFMA Credentials

After analyzing the work performed by facility managers, we have defined 11 competency areas. Our three world class FM credentials, — Facility Management Professional™ (FMP®), Sustainability Facility Professional® (SFP®), and Certified Facility Manager® (CFM®) — are based on these competencies.



1. The FMP® is the foundational credential for FM professionals and industry suppliers looking to increase their depth-of-knowledge on the core FM topics deemed critical by employers.
2. The SFP® is the leading credential for all FM and like-minded professionals with an interest in the development of sustainable FM strategies.
3. The CFM® is the premier certification for experienced FM professionals. A comprehensive exam assesses knowledge, skills, and proficiency across all FM competency areas.

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IFMA's Core Competency Courses

IFMA's 11 core competency courses, developed from IFMA's Global Job Analysis (GJTA), comprise the body of knowledge for facility managers. IFMA continuously refreshes the courses to align with global industry standards for FM knowledge, skills, and tasks. The courses provide practical knowledge and examples to help you improve your performance.

IFMA's Core Competency Courses include the following:

Communication: develop the skills you need to be an effective liaison between external and internal stakeholders.

Participants will be able to:

- Create and deliver the right message for the intended result.
- Develop an FM communication plan.
- Identify and share relevant information to the appropriate audience.

Risk Management: address the role of the facility manager in supporting or leading risk management planning; emergency preparedness, response and recovery; facility resilience and business continuity.

Participants will understand how to:

- Respond appropriately to emergencies affecting the facility.
- Meet the organization's business continuity goals.

Facility Information Management and Technology Management: understand how to leverage modern tools and techniques for today's workplaces and occupants.

Participants will be able to:

- Understand secure, efficient data collection supports decision-making processes to meet core business objectives.
- Conduct technology needs assessments and anticipate the impact of new technologies.
- Understand decisions are made to keep, update, augment, or replace technology.

Occupancy and Human Factors: grow your ability to support organizational and individual occupant performance, while leading the FM team to develop and implement practices necessary to achieve success.

Participants will be able to:

- Create an environment where motivation, productivity, and retention are the norm.
- Blend safety and security with innovation.
- Negotiate service level agreements.

Real Estate: understand real estate principles and practices and how they contribute to achieving the core business strategy.

Participants will be able to:

- Develop and implement a real estate strategy to support the core business including assessing, acquiring, and disposing of real estate, and space management.
- Understand project management principles for managing new construction and other major projects.

Performance and Quality: define and make relevant what it means to capture fitness for the intended purpose, embrace a continuous improvement mindset, and satisfy stakeholders' needs.

Participants will be able to:

- Determine the needs and expectations of stakeholders for the facility and related service requirements.
- Understand and describe what comprises a comprehensive quality management system for FM.
- Measure the FM organization's performance to make continual improvements.

Sustainability: define the basics of five areas of sustainability and make relevant what it means to embrace sustainability.

Participants will be able to:

- Understand the management basics of:
  - Energy
  - Water
  - Materials and Consumables
  - Waste
  - Workplace and Site

Welcome

Course Introduction

Welcome to IFMA's Communications Course!

Participant Introductions

- → Your name
- → Company name and/or job responsibilities
- → Reason(s) for taking this course — expected outcome(s)
- → Your experience in FM — years and work responsibilities over your career

Expectations

Learner responsibilities:

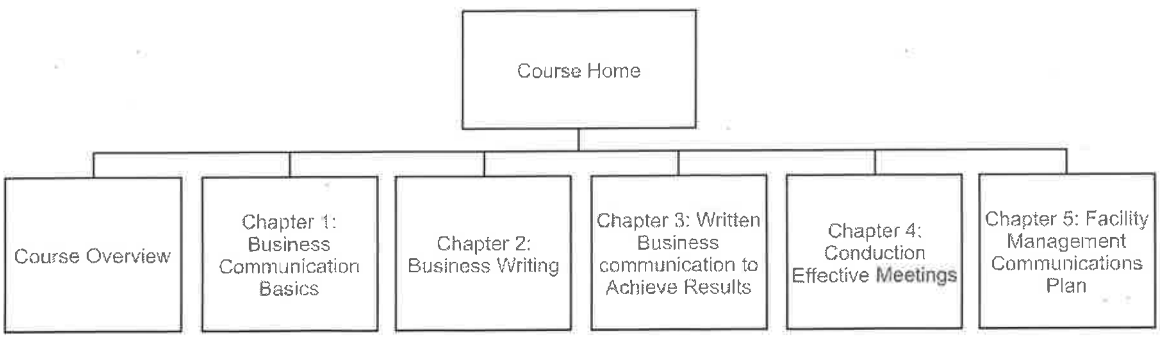
- → Be prepared – complete class pre-work
- → Take part in class discussions and activities
- → Follow the rules of common courtesy
- → Provide feedback to the instructor and IFMA

Course Audience

Welcome to IFMA's Communications Course! This course is designed for persons interested in developing knowledge and skills in IFMA's FM Core Competencies and who wish to gain practical knowledge to enhance FM industry professional development.

Course Chapters

There are five chapters in the Communications core course.



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Course Goals

The goal of the communications course is to review, discuss, and explain the fundamental knowledge and skills a facility manager needs to be an effective and efficient communicator. This applies to formal and informal interaction. Such competence enables the facility manager to:

- Prepare and deliver messages to achieve the intended result.
- Communicate effectively and appropriately with senior management.
- Improve positive visibility of the FM function to all stakeholders.
- Develop, manage, or oversee the facility management communication plan.

Course Overview

Good communication is essential for Facility Management to maintain good relations with building occupants. It is preferable to overcommunicate. An individual might prefer to receive what could be considered an unnecessary communication that may have some validity to it rather than not be informed about something even if it is considered to be minor. Individuals who are not brought into a process may become defensive and make a situation more difficult than it needs to be.

Good communication is about not making assumptions, ensure that feedback is solicited to ensure that the message has been received and understood.

Points to keep in mind for good facility management communication are:

- Understand and meet the needs of the stakeholders.
- Appropriate repetition and reinforcement are necessary to get the message through.
- Information is assimilated differently by different individuals. Write communication to include all possible audiences.

Communication Competencies in FM

Outlined below are the competencies and the performance standards that a facility manager should know regarding communication, the planning, delivery and evaluation.

Given the need to communicate information to stakeholders, a competent facility manger plans for communications in a manner that:

- The communication plan specifies the stakeholders, purpose of the communication, frequency of the communication, and the media to be used to distribute the messages.

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- The communication media selected:
  - are accessible to the audience
  - are best suited for the level of urgency required
  - are best suited for how permanent the message is and whether people need to be able to access or refer to it periodically
  - support the level of detail in the message
  - support the design of the message
  - support the need for privacy and confidentiality

Given a communication plan a competent facility manger delivers communication in a manner that the communications:

- arrive in the agreed-upon time frame
- contain the type of information and level of detail expected
- support stakeholder decisions and actions
- follow the principles of good message design
- make use of the appropriate media

Given the delivery of communication a competent facility manager evaluates communications in a manner that:

- the effectiveness of the communication meets pre-determined criteria and the results are evaluated
- stakeholder reactions are solicited proactively and frequently, documented and used to modify communication plans

Chapter 1: Business Communication Basics

Lessons

- Objectives
- Lesson 1: Nature of Communication
- Lesson 2: Effective and Efficient Communication
- Lesson 3: Cross-functional Communication
- Lesson 4: Cross-cultural Communication
- Lesson 5: Intergenerational Communication
- Lesson 6: Issues Shaping FM Communication

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Objectives

Chapter 1: Objectives

On completion of this chapter, you will be able to:

- Understand the basic communication process and how it relates to Facility Management.
- Describe how communication takes place in organizations, including barriers inhibiting organizational communication.
- Identify the factors impacting effective and efficient communication.
- Describe how communication conveys the intended message to the intended audience.
- Explain the role of active listening in effective communication.
- Explain key aspects of cross-functional communication.
- Explain key aspects of cross-cultural communication.
- Recognize prevailing issues shaping organizational communication.

This chapter focuses on how communication takes place. It examines the importance of context in influencing the success or failure of the information to achieve the intended actions and to be put to useful purposes.

Communication refers to the process by which **information** (the message) is successfully transmitted and understood by two or more people, with emphasis on the information/message being understood. The intended meaning of the person transmitting the information/message is the basis of good communication. All parties to the message must agree on the meaning of what is being communicated. Communication barriers can hinder agreement to the message's intended meaning. The impact can be significant in FM.

Communication Fundamentals Example:

The following example demonstrates how communication can result in success or a missed opportunity for a facility manager.

A facility manager works diligently on a presentation. The intent is to convince senior management to replace an inefficient facility by leasing a newer property. Although the argument is an impassioned presentation with substantial FM data, the idea is rejected. With no reason given, the facility manager wonders what went wrong. From the senior management team's perspective, the presentation contained too much tactical FM data and failed to make a strong business case.

The facility manager failed to communicate in the language upon which senior management could act. The facility manager let the operational message dominate the strategic message senior management expected to hear.

Tips for Knowing What to Communicate

- Information, data and knowledge, aided by technology and media, facilitate the ability to communicate quickly, succinctly and accurately.
- Knowing what information to communicate for a given purpose is important. The following questions help to determine this:
  - What does your audience need to know?
  - How does the presentation's subject fulfill the audience's need?
  - How can you make the benefits of the presentation clear to the audience?

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Lesson 1: Nature of Communication

This lesson focuses on these subjects:

- Nature of Communication
- Effective and Efficient Communication
- Cross-functional Communication
- Cross-cultural Communication
- Intergenerational Communication
- Issues Shaping FM Communication

Forms of Organizational Communication

Communication is the two-way process of creating and sending messages and receiving feedback with the goal to influence the opinions, actions and decisions of the intended audience. The **communication process** includes selecting the appropriate media to best reach the intended audience at the right time.

Before discussing the communication process, it is helpful to take a brief look at the three forms of organization communication: formal, informal and grapevine.

- **Formal communication** - is officially sanctioned by the demand or FM organization. Such communication is planned and carried out according to organizational structure and the official chain of command. Formal communication is well documented, amendments and changes to formal communication are restricted.
  - **Formal Communication Example:**

    The following is an example of formal communication:
    Facility occupants should pay careful attention to an FM communication about parking lot maintenance and adhere to special instructions, even if the information is sent in an email and posted through social media.
- **Informal communication** - is not officially sanctioned by the FM organization. It does not follow any official chain of command. Most communication in an organization is informal, the importance of this should not be ignored.
  - **Informal Communication Example:**

    The following is an example of informal communication:
    A facility manager reviews the department policy and procedure for alarm system preventive maintenance with a new staff electrician. When the

electrician is in the field testing an alarm system, the facility manager sends an instant message (IM or text) to remind the electrician to follow-up with the customer when the job is complete and confirm the alarm is working properly.

- **The Grapevine** - An organization's management does its best to communicate important news quickly to employees though email, instant messaging and other direct formal channels. Employees rely to some extent on the corporate grapevine, an unstructured and informal network based on social relationships rather than on organizational hierarchies or job descriptions. It transmits information, gossip and rumors rapidly; these tend to have a kernel of truth. Although most employees use the grapevine, very few prefer this source or believe its credibility. They turn to the grapevine when other options are unavailable or too slow.
  - **Grapevine Example:**

    The following is an example of the grapevine:
    The grapevine springs into action following an organizational announcement about a relocation. Formal communication addresses why the relocation is happening, whom it will affect, where the new space is located, when the move will take place, how the new space will affect them and key contacts for relocation information.
    The facility manager is aware fears and anxieties are causing general uneasiness among facility occupants. Department contacts and employee representatives from various functions have been enlisted by the relocation project team to help secure and maintain employee cooperation in the project. The facility manager tries to ensure these individuals are privy to accurate information about the details of the move and how the plans will affect occupants, the thought being these individuals have good potential to influence their peers through the grapevine before the move.
- **Techniques for Handling the Grapevine**
  - The first step in dealing with gossip and other rumors is to get plugged into the grapevine. Know the latest gossip to deal with it effectively. Listen to the rumors circulating. For example, a staff member might comment about an occupant considering leaving the facility and moving into a competitor's building. The staff member may be trying to get more information about the rumor, waiting for confirmation or denial. It is time to deal with the gossip when you hear similar comments or questions from other employees.
  - Deal with gossip either formally for example with an official email or announcement in a meeting, or informally for example, hallway or lunch conversations with key employees. Be proactive and influence the impact of these informal messages by addressing employee concerns. Doing nothing, contributes to lost time and productivity as employees try to gather and

interpret information about the rumor. This is important if the rumor has job-related consequences, such as a merger or layoff situation.

- In summary, it is better to be a proactive communicator rather than allow rumors and gossip to undermine employee productivity.

The Communication Process

Whether a facility manager informally talks with a colleague or makes a presentation, the transfer of the information is the same **communication process**.

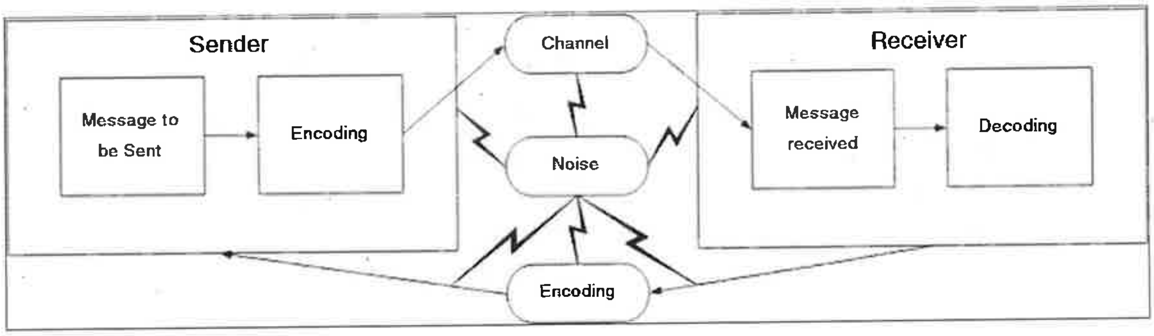

Figure 1 Communication Process

The communication process, as shown in Figure 1, contains five elements:

- The **communicator** - who is sending the message
- The **message** - what is being said
- The **medium** - how the message is sent
- The **receiver** - who is getting the message
- The **feedback** - what the outcome is

In each of these steps, an effective communicator considers how possible physical limitations or cultural differences might inhibit or disrupt communication. A brief explanation of each element follows.

The Communicator (Sender)

The **communicator**, or **sender**, is the person initiating and sending a message with ideas, intentions, information and a purpose for communicating. The sender translates or **encodes** ideas and information into a clear message which communicates the intended meaning of the communication to the receiver. The sender decides what must be done to put the message into a format such as language, symbols and gestures that the receiver understands. The sender determines the best way, medium or communication channel, to send the message and uses words and nonverbal cues to convey the message effectively.

Failure to determine the receiver's ability to **decode** the message can lead to confusion and misunderstanding. Factors about the receiver must be considered to ensure the intended message is received. These factors include the receiver's gender, age, culture, primary language, experience, knowledge level and ability to hear. These factors are dealt with throughout this course.

The Medium (Communication Channel)

The **medium**, or **communication channel**, is how the message is transmitted. It is the pathway through which the message is sent. A communication channel is categorized as upward, downward, or lateral. Discussion of each channel follows. Figure 2 illustrates these directions and provides examples of the kind of FM communication flowing through the channels.

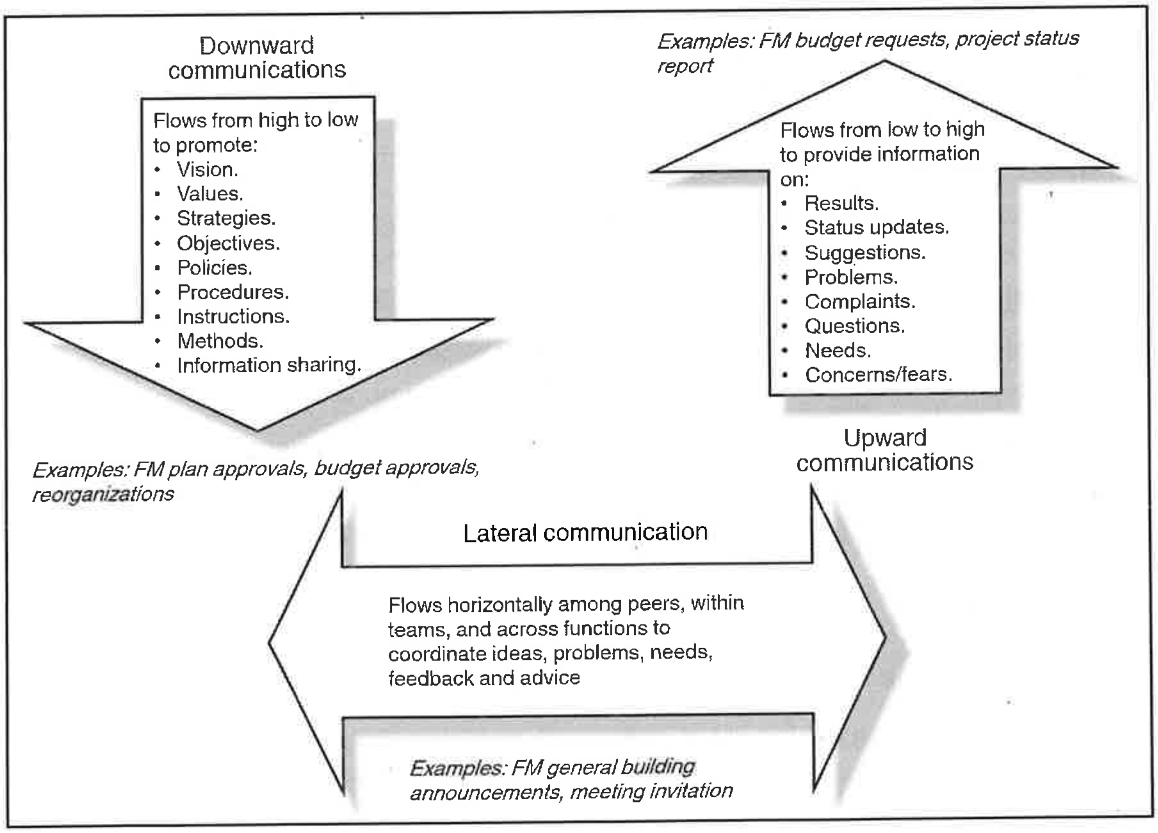

Figure 2 Communication Direction and Flow

- **Upward communication** - flows to a higher level in an organization. It keeps facility managers aware of how employees feel about their jobs, coworkers, the organization and facility occupants. Managers rely on upward communication for ideas or suggestions from staff and facility occupants on how to improve the FM function and its service delivery.

  Tips to Improve Upward Communication

  Upward communication is difficult, managers are overwhelmed and easily distracted. To engage in effective communication:

  - Reduce distractions by scheduling meetings with subordinates in your office or in a conference room rather than in their cubicle.
  - Communicate in headlines, not paragraphs to get the receiver's attention. Avoid wandering, irrelevant content.
  - Support the headlines with actionable items; that is, what you want to happen.
  - Prepare a meeting agenda to ensure efficient use of time and attention for everyone attending.

- **Downward communication** - flows from one level of the organization to a lower level. Common forms of this communication are strategic plans, memos, emails from the CEO; company-wide mission statements, operating procedures, manuals and company publications.

  Tips to Improve Downward Communication

  If downward communication is incomplete, inadequate and inaccurate, it creates unnecessary stress and results in speculation as to what is happening in the organization. When engaging in effective communication within this flow:

  - Explain the reasons decisions are made. Your audience is more committed to accepting changes when they know the reasons behind them.
  - Inform your audience what is happening and ask for advice or opinions through upward communication. This results in higher engagement.

- **Lateral communication** - saves time and facilitates coordination, collaboration and cooperation. It takes place in the following ways:

  - Among members of the same work group.
  - Among members from different work groups at the same level.
  - Among managers at the same level.
  - Among other laterally equivalent personnel.

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Lateral communication is not officially sanctioned. Its flows are created informally to short-circuit upward and downward communication hierarchy and expedite action. From management's point of view, lateral communication has its advantages and disadvantages.

- Lateral communication is beneficial when strict adherence to upward and downward communication impedes transfer of information. In this instance, managers support lateral communication.
- Lateral communication creates dysfunctional conflicts when formal channels are breached. This happens when individuals go above or around managers to get things done. It can cause conflict when managers learn such actions or decisions occurred without their knowledge.

The Receiver & Feedback Loop

The **receiver** is the intended audience. The receiver interprets or **decodes** the message based on that individual's experiences and frames of reference. The receiver must receive and comprehend what the sender is conveying. If unsure, the receiver should paraphrase the sender's message back to the sender or ask the sender questions to clarify the meaning.

Feedback Loop

Feedback is the verbal or nonverbal reply or reaction to the message. A **feedback loop** or **response**, is crucial to two-way communication. It enables the communicator to determine whether the message was received and whether it produced the intended response.

Communication feedback comes in many forms. In face-to-face situations, in-person or virtual, direct feedback through verbal exchanges is possible, as are subtle means of communication through nonverbal cues of discontent or misunderstanding. Indirect feedback, such as poor maintenance quality, increased absenteeism or turnover or lack of coordination of service may indicate communication breakdown.

Active listening is a valuable technique to test understanding within the feedback loop. Discussion on active listening takes place in Lesson 2 of this chapter.

Noise

Noise refers to physiological, psychological, social or structural factors that interfere with or distort the intended message and its meaning. Environmental factors such as external sounds or room acoustics can inhibit communication and listening. Noise is anything disrupting the communication process.

Noise comes in different forms, such as:

- Physical pain or discomfort preventing the receiver from listening
- Fear or anxiety distracting the receiver and preventing concentration on the message
- A language barrier or cultural differences preventing the receiver from understanding the message
- The receiver being hearing or sight impaired
- Unclear images, charts and other graphics used in presentations
- The communication channel used to transmit the message might be faulty or broken

Example of Noise

Noise can occur in any of the communication process elements. For example, a facility manager under a severe time constraint might send out a hastily written email message to staff members without proofreading it. Later, the manager discovers the wording in the email angered several employees. They thought the manager's email was rude and pushy. In this instance, the staff attached a different meaning to the message and ignored the actual information sent by the manager.

Filters

A **filter,** depicted as lightning bolts in Figure 1 Communication Process, is another source of noise in the communication process. It is also a barrier to communication. **Filtering** is any factor influencing how the communication is received or interpreted. Fear of conveying bad news and the desire to please one's boss lead employees to distort upward communication. For example, in upward communication, an employee filters information to the manager only what the employee feels the manager wants to know.

The number of levels in an organization's structure tends to determine filtering. Temptation to filter is likely at every level of the organization. Filtering is more common in upward communication in organizations when the communicator is at a lower level than the receiver. Upward communication carries control information to management for making decisions based on what it receives through the upward channel. The sender manipulates the message, using less harsh words to make the message seem more favorable. A message may never be received because of filters. This may involve deleting or delaying negative information sent through upward communication.

Tips for Minimizing Filtering

Filtering is less likely to happen when senior management creates what is called a **culture of candor**. This culture develops when managers:

- Communicate truthfully
- Seek out various sources of information
- Protect and reward those who speak openly and truthfully

Barriers to Communication

When a message is sent, regardless of communication form or channel, it does not mean communication is complete. A sender translates thoughts into words; a receiver translates words into thoughts. A likely issue is the difference between what the sender says and what the receiver hears, interprets and understands. Filters and noise affect what is sent and received and can create errors and misunderstandings or barriers to communication.

Despite the best intentions of the sender and receiver to communicate effectively, barriers can affect the exchange of information. **Barriers**, can be tangible or intangible factors and compromise the ability of a person to pay attention to what is heard or read. **Barriers** may be subtle or rooted in attitudes, values and relationship with the sender.

People on the receiving end of any communication are filtering the message through their personalities, experiences and value systems that define who they are. A facility manager who recognizes this communication reality has distinct potential in achieving intended results. Topic 2, Effective and Efficient Communication, explains how effective and efficient communication helps the facility manager get results.

Facility managers need to understand there are many inherent barriers in the communication process - no matter what the message or the medium. The list of barriers found later in this discussion is not all-inclusive.

Communication Fundamentals Example (Cont.)

To better recognize communication barriers, return to the example earlier in this chapter of the facility manager's presentation recommending to senior management replacement of the inefficient facility.

Following the rejection of the recommendation, the facility manager felt the management team failed to understand the real value of the idea and recommendation. Senior management decided not to lease a newer property. Perhaps senior management had another agenda. For instance, senior management might have prior knowledge of a merger eliminating the need for the recommended action but were not able to tell the facility manager.

Alternatively, the presentation might have been the problem. The outcome might have been different if the facility manager had been aware of potential barriers to communication such as frame of reference, value judgments, status effects and the absence of feedback.

Discussion of Communication Barriers

A discussion of barriers to communication that a facility manager encounters in organizational and interpersonal FM communications follows.

- **Interruptions or distractions**
  Interruptions to take telephone calls or reply to emails and instant messages can affect a person's concentration and interfere with effective communication.
- **Environmental challenges**
  Background noise, poor lighting, temperature discomfort or other environmental factors can be communication barriers. Communicating with people in different buildings or geographic locations can be problematic. Communicating in the proper venue or environment minimizes interruptions, distractions and other environmental challenges.
- **Frame of reference**
  Depending on their knowledge, education and experience and the type of organization, people can interpret the same communication differently. The communicator and the receiver speak the same language, the message conflicts with the way the receiver perceives its meaning. Communication becomes distorted and impossible if no common experience or frame of reference exists.

  Frames of reference and interpretation of events vary based on a person's organizational experience and standing within the organization. As a result, the needs, values, attitudes and expectations of individuals differ. This results in unintentional distortion of communication. Individuals choose the part of their past experiences which helps them form conclusions and judgments about the current experience.
- **Selective listening**
  About 75 percent of communication is listening. On average only 35 percent of the time is spent listening. This results in numerous listening errors and deficiencies.

People listen based on their needs, motivations, experience, background and other characteristics. Receivers place their interests and expectations into communications as they decode them. Active listening, follows in Topic 2, Effective and Efficient Communication.

- **Value judgments**
  In every communication situation, the receiver makes a value judgment and assigns an overall worth to the message before reading or listening to the complete message. This is based on previous experience with the communicator or on the message's anticipated meaning. Personal stereotypes, prejudices, preferences or emotions may lead an individual to form an opinion about a message during the communication event.
- **Source credibility**
  Source credibility refers to the trust, confidence and faith the receiver has in the communicator's words and actions. The level of credibility assigned affects how the receiver views and reacts to the communicator's words, ideas and action.

  Receiver-communicator relationship, previous experiences and political factors influence how people evaluate the words and actions of the communicator. For instance, everything a manager does represents some form of communication. If FM staff members view the facility manager as unethical, manipulative and untrustworthy, they may perceive negative motives to any communication from the facility manager. Little real communication between the staff and the facility manager may result.
- **Languages and cultural differences**
  Different cultural perspectives can inadvertently lead to miscommunication and misperception. For example, a simple hand gesture from the facility manager in a meeting with global participants could mean "perfect" to some but could represent an insult to others.

  The same word can mean different things to different people. Difficulty understanding or speaking a language can lead to frustration or embarrassment. Some words do not translate and lead to mistaken meanings. Subsequent competency content on cross-cultural communication later in Lesson 4, provides more detail on cultural differences.
- **Technical jargon**
  Technical jargon is not easy to understand, especially for people unfamiliar with its meaning within the context presented. For instance, a company creates its own language to differentiate products, processes or services from its competition. Occupational, professional and social groups develop words and phrases having meaning only to their members.

  These special words and phrases facilitate effective communication within the organization or group. Jargon results in communication breakdown with outside individuals and groups. Additional discussion on jargon follows in Chapter 2, Lesson 1, Business Communication Fundamentals.

- **Resistance to change**
  Accepting change from an individual perspective is usually progressive over time. Any communication dealing with change must consider change management and change leadership principles. *See the Leadership and Strategy and the Occupancy and Human Factors competencies for more information on change management and change leadership.*

- **Inappropriate communication channel**
  The communication channel selected should suit the message. The wrong communication vehicle can result in unintended consequences ranging from mild indifference or misunderstanding to damaged relationships, broken trust, anger, disunity and hostility.

  A good example of this barrier is the inappropriate use of email. The overload of workplace emails often desensitizes recipients to their content. Including excessive detail in an email can overwhelm recipients, cloud the message and thwart the objectives and intent of the communication.

- **Generational diversity**
  Differences between generations may affect communication. Not every Traditionalist, Baby Boomer, Gen Xer or Millennial fits within the applicable generational stereotype. A lack of understanding across generations can result in detrimental effects on communication and working relationships and undermine effective services.

- **Absence of feedback**
  Feedback is a vital part of the communication process. It helps clarify any disconnect between the intended message and the perceived meaning and mitigates interferences in the communication path. In electronic communications or social media, feedback occurs when a receiver responds with another message or comment. Feedback may be as simple as the receiver's paraphrased understanding of what was heard or seen. Time allowed for questions and answers is another feedback mechanism.

- **Time pressures**
  Time pressure can be a communication barrier. For example, managers do not have enough time to communicate frequently with all their subordinates individually. This can lead to a delay in getting an order approved or launching a new project. People may be more receptive at one time compared to another. Consider the other person's state of mind and time schedule to assess whether it is a good time and place to talk about a subject. If unexpected negative reactions occur during a conversation, consider whether the other person is not ready to hear the message. It may be best to continue the conversation later.

- **Communication overload**
  Individuals have a finite capacity for processing data and information. Advances in communication technology result in quickly exceeding this capacity and lead to information or communication overload from emails, voice mails, instant messaging, calls, meetings and reports.

  Business accountability and availability, including sharing information, can translate to a bombardment of communication. One of the vital tasks to perform as a facility manager is making decisions. Information is necessary to accomplish this. The amount of data and information received results in an inability to absorb and respond to all the messages. This can lead to message screen out, the tendency to select, ignore, pass over or forget information. It can lead to putting off further processing of information until the overload situation diminishes. In either instance, lost information and less effective communication result.

Tips and Techniques for Improving Communication

No aspect of a facility manager's job functions without communication. As a facility manager striving to become a better communicator, there are two tasks:

- Improve your messages.
- Improve your understanding of what others communicate to you.

As organizations become more diverse and global, opportunities for communication breakdown increase. Each person who interacts with your organization has a distinct personality, background, experience and frame of reference. This discussion provides tips and techniques to use to improve business communication and minimize these breakdowns.

- Follow Up
  - Follow up when you believe the receiver misunderstood the message. Whenever possible, attempt to determine whether the intended meaning was received.
  - You want to be perceived as helpful, not as a micromanager. Use the following illustrations to help you formulate what to say to the receiver:
    - Was anything we covered here not completely clear?
    - I remember what it was like when I started working with that occupant. I'll check in with you later to see if you have additional questions.

- Regulate Information Flow
    - To eliminate the barrier of communication or information overload, communicate with senior management, staff or facility occupants on matters requiring their attention, not just for the sake of communication.
- Communicate In-person
    - Feedback is important to effective communication. It is easy to send an email or instant message but face-to-face communication is the best method for getting feedback and determining whether the message was received as intended. Words, inflection, tone and other voice qualities impact message meaning. Nonverbal cues can be observed.
    - Schedule a time to meet face-to-face to discuss a situation, even if for only a few minutes. Face-to-face conversation might be in-person or through a video call.
    - Use active listening and observation to see how a message is received. This method provides verbal and nonverbal cues to help determine this. Find discussion on active listening in Topic 2, Effective and Efficient Communication.
- Demonstrate Empathy
    - Empathy helps you see the receiver's position, by assuming the receiver's viewpoint and emotions to anticipate how the message is likely to be decoded.
    - The greater the gap between experiences and background, the greater the effort needs to be made to find common understanding.
    - Encourage an effective work environment by allowing others to communicate what they are thinking. This minimizes misunderstandings, unnecessary conflicts and communication breakdowns.
- Incorporate Repetition
    - Introduce repetition and redundancy into your communication to help ensure the message is understood. For example, new employees receive the same information about the organization, their department and their jobs in different forms to ensure key issues are communicated.

- Encourage Mutual Trust
    - Time pressures often cancel the possibility of following up on communication and encouraging feedback. Create an environment of mutual confidence and trust to facilitate communication. As a result, following up on each communication becomes less critical. No loss in understanding results due to high source credibility between the facility manager and staff.
    - Ensure everyone in the FM department respects and honors privacy and confidentiality within the department and the organization. This applies to privacy and confidentiality when relating to occupants and external audiences. Doing so diminishes gossip and confidentiality breaches and mitigates toxic conversations about people's private lives.
- Simplify Language
    - Effective communication involves transmitting understanding and information. Encode messages in words, requests and content meaningful to the receiver.
- Communicate Ethically
    - In conjunction with encouraging mutual trust, practice ethically truthful and honest communication. This type of communication is based on business values and the organization's overarching code of conduct or code of ethics.
    - Be open and transparent. The messages must instill complete honesty. For example, speaking 99 percent of the truth in a matter and intentionally leaving out 1 percent of the facts is not ethical communication. Omitting any detail changes the way the audience perceives an event.
    - Prevent instances of misunderstandings or miscommunication. Honesty is linked to personal and professional trustworthiness and integrity. This can determine the success or failure of a project. For instance, unethical communication about budget constraints during a board meeting can be the difference between meeting goals or failing due to miscommunication.
    - Consider any potential roadblocks when communicating. These may influence how the audience understands or receives the information communicated. Roadblocks include, language use, jargon, language fluency and accessibility to technology. If a roadblock exists, lessen it to ensure the audience fully understands what they should know and act on.
    - Engage in active listening to ensure the effectiveness of ethical communication. Ask questions for clarification when any point is not fully understood.
    - Communicate non-judgmentally to reduce unnecessary conflict and eliminate accusatory or critical comments.
      Bringing personal experience into communication is important, if it provides

credible backup for arguments and helps give the audience a better understanding of what they need to know and act on.

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Lesson 2: Effective and Efficient Communication

This lesson focuses on these subjects:

- Distinguishing between Effective and Efficient Communication
- Elements of Effective Communication
- Tips and Techniques for Effective Communication
- Nonverbal Communication
- Active Listening
- Tips and Techniques for Active Listening
- Questioning
- Tips and Techniques for Asking Questions

Distinguishing between Effective and Efficient Communication

Effective communication - makes its point, is heard, understood and acted upon by those being communicated to.

Efficient communication - is succinct and expends minimal resources. It implies an optimized cost in terms of resources used such as time, money and effort. For example, a facility manager may send an email to several parties in lieu of calling or meeting with them individually.

It is important to recognize the distinctions between effective communication and efficient communication. The two characteristics do not need to be at odds with each other. In the ideal scenario, a communication is both. The following example illustrates this.

Effective and efficient - After meeting with information technology (IT) and human resources (HR) management, a facility manager sends an email to all FM staff regarding departmental mobile device management technology for employee-owned devices. The facility manager addresses the email to all FM staff in a department distribution list with a CC to IT and HR management. Succinct, optimal and in line with organizational email protocols, the communication is effective and efficient.

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Effective communication may not be efficient communication and vice versa. The following examples illustrate this:

- Effective but not efficient
  - A facility manager with a staff of 20 internal and external employees visits each employee to explain a policy change. The one-on-one exchange helps to ensure that all staff members understand the change. The communication is effective but not efficient because the individual meetings are an expensive time proposition.
- Efficient but not effective
  - A facility manager relies on email to communicate the policy change to FM staff. A few of the unskilled workers have no computer access and are unaware of the communication. Additionally, the email is in English. For those workers who received the email but for whom English is a second language, parts of the message are misunderstood. The communication may be efficient, but it is not effective because it is not understood by all FM staff.

Elements of Effective Communication

Effective communication requires the following elements:

- Know the intended audience.
- Be clear about the purpose of the message.
- Relate the message so it is easily accepted and understood by the intended audience.
- Use the appropriate media to reach the intended audience.
- Solicit feedback to confirm the purpose of the message was achieved.

Discussion of these elements follows next as tips and techniques. Other elements contributing to effective and efficient communication are nonverbal communication, active listening, questioning and media. Discussion of these elements are found later in this lesson.

The "Cs" of Effective Communication

Table 1 lists some typical "C" words associated with effective communication, with descriptions of their applications.

Characteristic	Implications
Concise	Provides the appropriate level of detail but avoids using excessive and needless words or overloading recipients with multiple messages; gets

	essential points across completely and in a manner that facilitates intended results.
Complete	Conveys all facts required by the audience; attempts to cover all the necessary information the first time without progressive installments.
Clear	Makes use of exact, appropriate and familiar words for the audience; does not overuse jargon or confusing technical terms.
Correct	Implies that facts and figures used in the message are accurate; ensures that the message has no spelling, punctuation or grammar errors.
Conversational	Presents information in a conversational tone that is professional, supports the purpose and, as feasible, invites interaction, questions and answers.
Contextual	Considers the receiver's mindset and conveys the message accordingly; addresses the audience in his/her language.

Table 1 The "Cs" of Effective Communication

Tips and Techniques for Effective Communication

The first consideration is identifying all the people who need the information to be shared. When you **know** the intended audience, communication becomes effective because it addresses **what** the recipient needs to know and **when**.

- Know the Intended Audience
  - Consider the intended audience's background. This encompasses education and experiential differences, culture and language. As sender, assess whether your message is within the receiver's range of perception and understanding.
  - In general, audiences with diverse disciplines and backgrounds are part of business teams, customer calls, organizational levels, board or executive meetings and other events. It is critical that the need to communicate with mixed audiences are recognized when telling or selling a project to business teams or senior executives.
- Be Clear about the Purpose of the Message
  - Communication always has a purpose. A clear message addresses the reason for communicating and what is to be accomplished with the communication.

  Examples of questions which help clarify the message's purpose:

  - Are you announcing a new service to facility occupants?
  - Are you hoping to influence attitudes or achieve consensus?

    - Are you seeking feedback from the intended audience?
    - Do you want the audience to decide or act on a proposal?
    - Do you have some combination of motives in mind?
  - Whether the message is intended to inform or educate, persuade or inspire, initiate action or some other motive, make clear what is to be conveyed from the outset. People need to know what is expected of them from the communication.
- Relate Message So It Is Accepted and Understood by the Intended Audience
  - Crafting an understandable message involves tailoring the message to the audience. With a clear picture of the intended audience, ask questions such as:
    - How much does the audience already know about the topic?
    - How much background information does the audience need?
    - Why should the topic be of interest to the audience?
    - What aspects of the topic matter to them?
    - What are the specific benefits for the audience?
    - If the intention is to persuade or initiate action, how difficult will it be for the audience to respond or act?
  - Different audiences may require different information. As it is established what the audience needs to know, vary the messages accordingly. As an example, when unveiling a new business continuity process, the board and senior management are interested in strategic and financial information about the process. Alternatively, facility staff must know what they need to do to support process success.
- Use the Appropriate Media to Reach the Intended Audience
  - For example, it is likely you have received an email blast sent to the entire organization. It appears the sender has no idea who the intended audience is. It appears that the sender hopes the undefined intended audience notices the message. This is an inefficient and inappropriate media choice. It dilutes the message intent, leads to indifference and confusion or creates other problems.
  - When selecting an appropriate delivery method, consider factors such as:
    - **Urgency** - whether the message is routine information, important, critical or time-sensitive.
    - **Message distribution** - who needs to receive the information; the number and makeup of the receivers.
    - **Physical constraints** - size of the audience, how dispersed audience members are, time zones and the technology and resources available.
    - **Security/privacy/sensitivity considerations** - any legal, risk, professional or proprietary aspects.

- **Need for retention/retrieval** - whether the information should be retained and for how long plus the methods for storing, maintaining, updating, retrieving and disposing of the information.
- **Cost** - cost constraints, image and brand considerations.
- **Preference** - a phone call, a meeting in person or virtual, an email or an instant message.

- Solicit Feedback to Confirm the Message's Purpose Was Achieved
  - The intended audience should not be considered passive recipients of the message. Feedback is essential in communication. It is the audience's response, as to whether the recipients have understood the message in the same terms they were intended and whether the recipients agree with the message. If the audience does not understand the message, refine it to clarify. Any opportunity to garner feedback is important in increasing communication effectiveness. Feedback enables evaluation of the effectiveness of the message and whether the purpose is achieved.
  - In face-to-face communication, the opportunity to observe nonverbal cues or to ask and answer questions helps assess whether the intended meaning equals the recipient's perceived meaning. If not in face-to-face communication, follow-up queries and feedback received from recipients can help to determine if the communication was clear and useful to the audience
  - Consider issues learned through feedback. To improve or sustain effective communication, consider what can be done differently the next time. Failure to do so may compromise FM credibility and the potential of receiving critical feedback again. As much as possible, act on feedback.

Nonverbal Communication

Every time a message is verbally given, a nonverbal message is disclosed. As Figure 3 depicts, 55 percent of message meaning comes from **body language**. Most messages are communicated nonverbally. **Nonverbal communication** includes facial expressions, gestures, eye contact, rolling of the eyes, posture, body movements, tone and loudness of the voice.

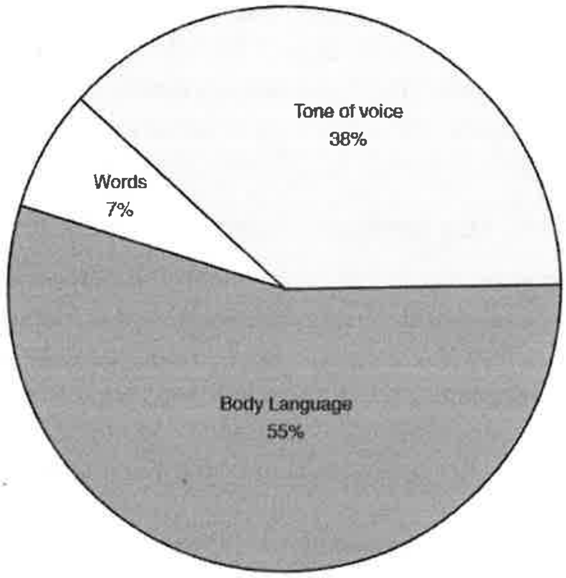

Figure 3 How Information Is Conveyed

Body language communicates information more accurately than words, we cannot keep from acting nonverbally. Anyone trying to act as passively as possible, may be perceived as inexpressive, inhibited, withdrawn, or uptight. Being aware that nonverbal messages are constantly sent, effectiveness can be increased in FM occupant and coworker encounters

Nonverbal cues like facial expressions, eye contact and movements provide information about the type of emotion a person is conveying. **Physical cues** such as distance, posture and gestures indicate the intensity of the emotion. Often, an individual sends more information through the nonverbal communication channel than is obtained in verbal messages. To increase the effectiveness of communication, the sender and receiver must be aware of the nonverbal and verbal content of messages.

Consider the importance of a nonverbal cue as illustrated in the following example:

- During a question-and-answer session following a presentation, a facility manager listens while crossing his arms for warmth. Conscious of the nonverbal message typically associated with crossed arms, the facility manager does not want the audience to think he is disinterested or unreceptive. Before answering the first question he begins by saying, "I'm cold" and asking, "Are any of you?"

Some nonverbal messages are spontaneous and unregulated expressions of emotion, while others are conscious and deliberate. For example, lifted eyebrows are indicative of disbelief or surprise. Folded arms are used to isolate or protect. Shrugged shoulders show indifference and fingers tapping, impatience.

Most nonverbal communication is culturally based. Individuals learn to behave and communicate in certain ways and interpret the meanings of those behaviors as they grow up in the origin culture. Values, beliefs, behaviors and ways of thinking acceptable to others and expected of us as members of our society are acquired. What may be strictly forbidden in one culture may be perfectly normal in another. As members of a global community, not only must we learn and abide by the rules of the society we grew up in, but also understand and appreciate the rules of other societies.

Table 2 provides a list of the more important nonverbal cues found in Western cultures, along with their implications. Keep in mind multi-cultural differences in nonverbal communication, especially gestures and personal space. These are open to misinterpretation as they relate to other cultures.

Nonverbal Cues	**Implications**
Facial expressions	Convey countless emotions without saying a word such as agreement or disagreement, understanding, confusion, concern and even emotions such as happiness, sadness, anger, surprise, fear and disgust.
Posture and body movements	Affect individual perceptions; influenced by the way people sit, walk, stand up, hold their head and subtle movements.
Gestures	Embellish communication in a wide variety of ways both positive and negative; expressing through gestures often occurs spontaneously and without thinking; may be substituted for words.
Eye contact	Helps maintain the flow of conversation and gauge the other person's response; communicates many things, including interest, hostility and a range of other emotions.
Personal space	Communicates interest, dominance, aggression and other emotions; differs widely depending on the culture, the situation and the relationship between the parties.
Voice	Conveys many attributes such as confidence, nervousness,

	authority, sarcasm, anger, boredom or understanding; encompasses rate of speech (how fast and the rhythm and flow of words), pitch (how high or low), volume, inflection, tone and even pauses intended to add interest, evoke curiosity and emphasize points.
Dress	Sends messages about who you are; influences perceptions and can either enhance or jeopardize receptivity to communication.

Table 2 Common Nonverbal Cues and Their Implications

Lesson 4 in this chapter, Cross-cultural Communication, examines cross-cultural communication further, including global considerations.

Active Listening

We speak at the rate of 150 to 160 words per minute, with the potential to reach 200 words per minute. We think at the rate of 650 to 700 words per minutes, often we are so busy thinking that we are not listening to what is being said.

Most people believe they listen effectively, research and theories related to listening contradict this. The average person remembers only 25 percent to 50 percent of what is heard.

Example of Diminished Listening

The following example illustrates this.

- A facility manager's presentation to the board about regulatory compliance lasts 30 minutes. The facility manager recently learned of the estimates about how much people remember, and hopes the key points were captured in the 25 percent to 50 percent of what was heard.

Hearing versus Listening

Listening is important in all communication. It is the primary means for determining another person's needs, that is what that person expects to be provided. These needs are communicated through inferences, indirect comments or nonverbal signals. In these instances, the understanding of how to be a good listener makes a better facility manager.

Good listening skills:

- Get better information
- Save time
- Solve problems
- Reduce errors

Poor listening Skills:

- Create misunderstandings
- Waste time
- Allow mistakes

In FM, mistakes in communication can lead to unforeseen events. This makes active listening important. Active listening improves the ability to comprehend verbal information. It helps communicate ideas and knowledge more effectively. Active listening involves a sender and receiver, which requires them checking to make sure the message is interpreted as intended. Active listening includes:

- Paying attention to what another person is saying.
- Thinking about what the other person said.
- Responding so that the other person knows you understood what was said.

Many people believe hearing and listening are synonymous. They are distinctly different.

Hearing is different from listening. As the first stage of listening, it is a physical yet passive act of perceiving sound. Hearing occurs when your ears pick up sound waves and transmits them to your brain. A person can hear what someone else says without listening to the message.

Listening is part of the communication process. It is hearing the sounds with deliberate intention. Listening involves actively thinking about the meaning of the message being heard. A person's interpretation of the message varies depending on personal values, beliefs and experiences.

Unlike hearing, listening is a skill which improves through conscious effort and practice. For instance, do not become distracted by things going on around you. Make a conscious effort to hear not only the words, but listen to what the other person is saying.

Example of Not Actively Listening

If you are thinking about what to say next while a person is talking to you, you are not listening. The following example illustrates this.

- A facility manager receives a phone call from an occupant complaining about service quality and requesting a follow-up call. Before the conversation is complete or a full understanding is reached, the facility manager starts to worry about what staff member caused the complaint, whether the occupant request can be delivered.

Benefits of Active Listening

Genuine active listening will:

- Encourage the speaker to keep talking.
- Indicate that the conversation is being followed.
- Set a comfortable tone.
- Signal attentiveness and interest to the speaker.

Good communication and understanding are made possible by active listening. Expressing thoughts, feelings and opinions clearly and effectively is part of the communication process. Such expression is complemented by actively listening to and understanding the messages others are trying to get across.

For a facility manager, becoming a better listener has the potential to improve communication effectiveness. Additional benefits possible with active listening include:

- **Creating a climate of cooperation and trust**
  Through active listening, a speaker can sense sincere interest. It shows genuinely wanting to understand the speaker's viewpoint. Active listening helps develop a good relationship between the speaker and the listener.
- **Increasing the flow of information**
  Active listening tends to open people up and get them to say more to get the required information.
- **Reducing misunderstandings**
  Misunderstandings occur when a breakdown in communication exists. In active listening, you confirm you do understand what the speaker has said, communication is enhanced and misunderstandings are mitigated.
- **Increasing the ability to influence, persuade and negotiate**
  Active listening is useful in situations where consensus and clarity are desired, where understanding is critical and where emotionally charged situations lead to conflict.
- **Building rapport and credibility**
  When practiced effectively, active listening helps foster a reputation as a good listener. People will want to talk to you. A side benefit is there is potential for developing new relationships.

Barriers to Active Listening

Physical or external and cultural factors, such as a noisy environment, a strong regional accent or a difference in terms of reference, are barriers to active listening.

Cultural differences can inhibit active listening. Lesson 4 in this chapter covers cross-cultural communication in detail. Chapter 4, Conducting Effective Meetings, includes information on meeting dynamics and how they support effective communication and active listening.

If people listen actively, they fail to do so for various reasons. Figure 4 depicts several of these factors.

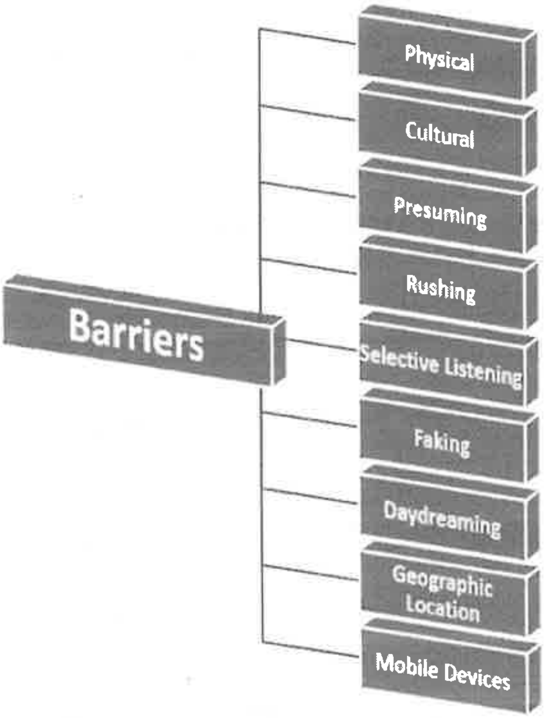

Figure 4 Barriers to Active Listening

- **Presuming**
Listeners presume what the speaker will say next and think they do not need to continue listening. Listeners may begin completing the other person's thoughts and jumping to incorrect conclusions.
- **Rushing**
With other commitments, a listener's mindset wanders elsewhere. Listeners want to move on with their own business; they do not feel they have time for the speaker.

- **Selective listening**
  Listeners pay attention only to what they want to hear. Information inconsistent with the listener's frame of reference or beyond a comfort zone may be ignored.
- **Faking**
  Listeners maintain an outward appearance of listening. They hold eye contact and nod to be polite, but they are not focused on the speaker's message.
- **Daydreaming**
  Weariness or preoccupation with other thoughts results in mind wandering and prevents the listener from paying attention. Daydreaming is especially problematic when the subject matter is not immediately engaging for the listener or something said by the speaker might set off a chain of thoughts in the listener's mind not relevant to the speaker's focus.
- **Geographic distance**
  When the listener and speaker are not in the same location, things going on in the listener's environment the speaker cannot control or influence jeopardize attention and listening.
- **Mobile devices**
  If being used while the speaker is talking, smartphones, tablets and other mobile devices compromise the listener's concentration and show disrespect.

Tips and Techniques for Active Listening

The elements depicted in Table 3 help to listen to another individual. They increase the likelihood the other person knows you are listening.

The elements described in Table 3 support active listening skills. They apply to face-to-face communication. The dynamics of a situation influence the implementation of these skills. For example, a video conference call limits observation of nonverbal cues and signals. Conversations in a meeting might hinder feedback and clarification.

Keep in mind some of the practices indicated in Table 3 may not be appropriate in all cultures. For example, how and when to make eye contact depends on the customs of where you are, who you are with and the social setting in which you are present. In most Western cultures, making eye contact is considered appropriate and demonstrates professionalism. In other cultures:

- Direct eye contact is considered aggressive, rude or disrespectful.
- Eye contact between men and women is perceived as threatening or flirtatious.
- Avoiding eye contact with a member of the opposite sex or a superior demonstrates respect.

Element	Implication	Examples
Concentrate.	Give your full attention to the speaker and concentrate on the message.	• Look directly at the speaker. • Pay attention to the speaker. • Put aside distracting thoughts. • Do not let your mind wander. • Do not let environmental factors distract you. • Observe nonverbal cues and signals. • Refrain from side conversations when listening in a group setting and do not answer your cell phone or text. • Do not think about how you will respond while listening.
Demonstrate that you are listening.	Use your own nonverbals to acknowledge the speaker and convey your attention.	• Maintain eye contact. • Sit up straight and watch your posture; make sure it is open and inviting. • Use nonverbal gestures such as nodding your head occasionally, leaning forward and smiling to show interest. • Encourage the speaker with small verbal comments such as "yes," "uh-huh" and "hmmm."
Provide feedback.	Reflect on what is being said and verify that your understanding is correct; do not assume that your perception matches the speaker's intent.	• Restate or paraphrase back to the speaker what he or she said. • Ask questions to check your perceptions. • Periodically summarize the speaker's comments. • Probe (if feasible); ask for additional information.
Defer judgment.	Let the speaker finish before you talk.	• Keep an open mind and suspend judgment. • Do not jump to conclusions about something the speaker says. • Do not stop listening because a word or topic triggers an emotional response. • Analyze facts and evidence. • Let yourself finish listening before you speak.

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Element	Implication	Examples
		• Do not interrupt the speaker.
Respond appropriately.	Be respectful of the speaker.	• Be candid and open in your responses. • Express your comments and questions respectfully; treat the speaker as you would want to be treated.

Table 3 Active Listening Practices

Tips and Techniques for Asking Questions

Questioning

A facility manager relies heavily on information and knowledge to fulfill professional responsibilities. Asking the right questions of the right people at the right time is an important part of effective communication and information exchange. The skill of **questioning** a contributes to learning. Questions help:

- Focus attention.
- Elicit new ideas.
- Encourage exploration.
- Foster commitment.

When asking questions, what is asked and how the question is asked affect the quality of the response. To help ensure response accuracy, completeness, relevance and timeliness:

- Think about what needs to be learnt.
- Plan questions beforehand, if feasible.
- Ask open questions.
- Be objective; avoid leading respondents in answers or interjecting personal bias in probes.
- Allow enough time for the individual to respond.
- Listen actively.

Questions to ask fall into seven techniques:

- Open-ended
- Closed-ended
- Probing
- Paraphrasing

- Hypothetical
- Leading
- Reflective

Four common question techniques are discussed next: **open-ended**, **closed-ended**, **probing** and **paraphrasing**. Table 4: Questioning Techniques, provides information for open-ended questions, close-ended questions and probing questions.

Examples	Advantages and Disadvantages
Open-ended questions *Asking the respondent for general information or to share his or her knowledge, opinions, or feelings; often begin with words like how, why, or what; may also use the expressions tell me or describe.*	
• How can I help you? • Why do you think this would be the best approach? • What seems to be the problem? • Tell me what happened. • Describe the event in more detail.	**Advantages:** • Allows an unrestrained or free response. • Strengthens relationships by demonstrating interest in resolving concerns. • Provides opportunities to meet and exceed expectations. **Disadvantages:** • Can be time-consuming. • May result in unnecessary information.
Close-ended questions *Used to obtain specific information or to uncover needs; can generally be answered with a "yes" or "no" response, a single word or a very short response.*	
• Have you experienced this service issue before? • Could you be more specific? • Does this answer your question? • Is that correct?	**Advantages:** • Quick and requires little time investment, just the answer. • Allows you to test your understanding. • Helps to conclude a discussion or make a decision. **Disadvantages:** • May result in incomplete responses. • Requires more time with inarticulate

Examples	Advantages and Disadvantages
	users. • Can be leading and potentially irritating or even threatening. • Can result in misleading assumptions/conclusions. • Discourages disclosure.
Probing questions *Follow-up questions used when a response is unclear, when answers are vague or ambiguous or when there is a need to obtain more specific information or details; sometimes as simple as asking for an example.*	
• What exactly do you mean by ...? • You mentioned ... Could you tell me more about that? • I'm not certain what you mean by ... Could you give me some examples? • What are some of your reasons for liking/disliking ...?	**Advantages:** • Can help gain clarification. • Restrictive and can be answered in a few words. • Helps in drawing information out of people who are trying to avoid disclosing something. **Disadvantages:** • Cannot be planned in advance as it is impossible to know what relevant issue the person might raise and how you might need to probe to learn more. • May make the respondent defensive, result in little useful information or require additional probing.

Table 4 Questioning Techniques

Questioning Techniques

- **Open-ended questions -** are commonly used to encourage the other party to respond, so you can gather the necessary information. The questions generally start with **why**, **what**, **where**, **which**, and **how**. They work best when the conversation is flowing freely. Table 4: Questioning Techniques provides additional information on open-ended questions.

- **Closed-ended questions** - require a **yes** or **no** answer. Such questions should be used sparingly because they tend to make the conversation feel awkward and one-sided. In some instances, these kinds of answers are fine. Table 4: Questioning Techniques provides additional information on closed-ended questions.
- **Probing questions** - help clarify something initially overlooked or thought irrelevant. Many of these questions are helpful in creating rapport. However, you must be careful not to overuse them because people might feel as if they are being interrogated or attacked. Keep your verbal and nonverbal cues neutral or supportive when asking probing questions. Table 4: Questioning Techniques provides additional information on probing questions.
- **Paraphrasing** - is one of the best ways to check your understanding of what the speaker said. Paraphrasing involves a restatement in your own words of the information given by the speaker.

  The use of paraphrasing:

  - Demonstrates to the speaker you are listening and understanding what the speaker is saying.
  - Enables you to ensure your interpretation or understanding of the ideas is correct.
  - Enables other people to check they have also understood the ideas presented.

  Examples of paraphrasing statements include:

  - I'm not sure I'm with you but...
  - If I'm hearing you correctly...
  - It appears to you...
  - Listening to you it seems as if...
  - So, as you see it...
  - The thing you feel is most important is...
  - To me, it's almost like you're saying...

Lesson 3: Cross-functional Communication

This lesson focuses on these subjects:

- Cross-functional Team Collaboration
- Cross-functional Communication Challenges
- Tips and Techniques for Cross-functional Communication

Cross-functional Team Collaboration

As a facility manager, work requires collaboration, cooperation and input from others throughout the organization. This work results in a group of people from all levels in the organization with different functional expertise working toward a common goal or addressing a specific problem. The group of people form a **cross-functional team** may include people from business functions such as administration, finance, marketing, operations and human resources. Members have various skills, competencies and experiences and can increase camaraderie, trust and performance within the organization.

Great opportunities occur when negotiating, influencing and persuading others. As a facility manager, cross-functional communication occurs daily through routine tasks or as a member of a cross-functional team. **Cross-functional communication** requires relationship power stemming from knowing the stakeholders and from how you know them. This is an important point to consider because nearly everything in your work will cross the FM functional area to other business functions. The stronger your relationships are, the better the pathways to communication are.

Example of Cross-functional Projects

- Improving emergency evacuation procedures.
- Instituting a new badging system throughout the facility.
- Ending delivery of employees' personal mail to the organization.
- Changing availability of food-related amenities in the company kitchen/breakroom/lunchroom, including removing refrigerator(s).

Cross-functional Communication Challenges

This team function can lead to cross-functional communication challenges. Poor cross-functional communication undermines productivity and creates issues for the team members. Discussion of a few of the issues follows.

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- **Lack of Clarity** - Not only do cross-functional team members participate on the cross-functional teams, but they also report to their managers and receive information from various sources. They can lose track of what is happening and who needs to be informed about what. When it is time to make decisions or to act, uncertainty about who has the authority may occur. Without clearly defined structures and processes in place, cross-functional team leadership could struggle with this.
- **Lack of Trust** - Some amount of conflict is inevitable. If trust breaks down, secrecy increases and undermines productivity further. Team members might withhold information to benefit their departments over others or to avoid accountability for a problem.
- **Lack of Productivity** - Creating cross-functional teams can bring knowledge and expertise together. Without good communication, things can become chaotic. This can undermine productivity due to difficulty sharing information and allocating resources effectively. The result leaves less time for people to complete tasks.

Tips and Techniques for Cross-functional Communication

The key to good cross-functional communication is common ground and knowledge. This section discusses techniques to help accomplish this, as the cross-functional team leader.

- Respect and appreciate information sharing. Team members have different skill sets and different approaches to an undertaking. Varying viewpoints from members of a cross-functional team can be valuable.
- Learn what each team member brings to the process, what background and expertise each offers and what expectations each brings. This demonstrates that their participation and their approach are valued.
- Avoid jargon or acronyms in communications. For instance, an acronym like PM means something different depending on the background of an individual. If using jargon or acronyms is important to communicate with team members, consider creating a directory where each business function adds terms to ensure common understanding.
- Be adept at drawing out participation in meetings to improve communication. Ask questions during meetings when something is not understood and encourage others to do the same. For instance, after learning about the impact of finance on the organization and FM, a productive and intelligent conversation can be held with the finance department.

Another of example of this strategy follows. A facility project manager starts construction meetings for a new project by asking the stakeholder representative to write down any terms not understood during the meeting. Before ending the meeting, the project manager shares the representative's notes with the rest of the team and debriefs so everyone fully understands the decisions made at the meeting. Initiatives such as this by a facility manager might lead to advancement in the field.

- Encourage team members to also ask questions and have conversations outside of meetings to continue and build communication across functions.
- Ensure team members understand workflows, priorities and requirements as they related to the team project.
- **Develop a Communication Plan -** With various communication tools available, it is important to develop a clear plan stipulating how information will be shared not only within a cross-functional team but also with other stakeholders. At minimum, the plan should clarify reporting relationships, establish who has final decision-making authority and identify which tools to use to share information. The plan clarifies how to prioritize and streamline the cross-functional communication process.

  Make sure the communication plan does not conflict with the FM communication plan discussed in Chapter 5, Facility Management Communication Plan.
- **Establish Goals -** One of the most effective methods for facilitating cross-functional collaboration and communication is to develop a shared set of goals to keep a team focused. Setting shared goals minimizes working at cross purposes. Creating shared goals promotes a sense of community and a strong foundation of trust.
- **Build Trust -** Without trust, effective cross-functional communication and productive collaboration are difficult to achieve. Trust building involves time, effort and dedication. Team members must demonstrate their credibility, reliability and accountability to each other by following through on their commitments and taking responsibility for their actions. Trust results in team members being direct and honest in their cross-functional communication and able to manage conflict productively.

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Lesson 4: Cross-cultural Communication

This lesson focuses on these subjects:

- Globalization in Cross-cultural Communication
- FM Global Challenges
- Tips and Techniques for FM Cross-cultural Communication

Globalization in Cross-cultural Communication

Globalization refers to the growing interconnectedness and interdependency of countries, people and organizations. By its nature, globalization requires a facility manager to interact with people in other countries. One of the key challenges is the need to communicate effectively with people from other cultures who often speak different languages. It is ineffective managerially, and often offensive to the other party, to gravitate either to assuming certain cultural norms, values and practices are the only way to do things, known as **parochialism**, or to assume specific cultural norms, values and practices are the best way to do things, known as **ethnocentrism**.

Cross-cultural communication describes the ability to form, foster and improve relationships with members of a culture different from your own. The basis of cross-cultural communication is knowledge of many factors. This includes the other culture's values, perceptions, manners, social structure and decision-making practices. It includes an understanding of how members of the culture communicate verbally, nonverbally, in person, in writing and in various other business and social contexts

Use the communication process depicted in Figure 1 to examine cross-cultural communication. In cross-cultural communication, the sender and the receiver of the message are from different cultures and backgrounds. Cultures tend to act as filters. Cultures vary in terms of how explicitly messages are sent and received. For instance, a common mantra in the United States is, "Say what you mean and mean what you say." In many other cultures, this is confusing because communication may be more ambiguous and inexact.

In cross-cultural communication, discard assumptions, prejudices and stereotypes and recognize a person's own behaviors and reactions are a function of the individual's culture. Behaviors and reactions may not match your own, they are culturally appropriate for the individual with whom you are communicating.

Cross-cultural Communication Examples:

- A facility manager can encounter issues communicating across different cultures. For instance, a miscommunication during a meeting or over dinner can derail a relationship. A misstatement included in an email or a report may unintentionally ruin months of hard work. The following example illustrates a cross-cultural communication issue a facility manager might face.

  Example 1

  - During negotiations, a facility manager from a different culture innocently refuses an offer of a cup of coffee from a Saudi businessman. In the Saudi culture, the rejection is considered very rude and stalls the negotiation

  Example 2

  - During a video conference call, a Western facility manager uses the O.K. hand signal to indicate general agreement with a statement made by a Brazilian counterpart. In Brazil, the gesture does not mean "perfect." It is a vulgar insult.

- Confusion can occur when two groups speak the same language. For example, an expression does not necessarily mean the same thing to someone from the United Kingdom and to someone from United States. The following example illustrates this further.

  - A face-to-face meeting takes place between American and British facility managers to combine redundant operations in a multinational organization. As they discussed agenda items, small points were resolved expeditiously. The British representatives were frustrated every time they proposed to "table" a big issue. In America, "tabling" a topic means putting the issue to the side. To the British, it refers to putting the issue up for discussion. Every time the British said they wanted to discuss something; the Americans moved on.

The Key to Effective Cross-cultural Communication:

- As seen from the examples, domestic practices do not translate well across cultures or the same language. Cross-cultural communication is required to lessen cultural missteps. The key as facility manager is to learn everything possible about the culture(s) with which you are interacting. It is essential not to try to know all the possible cultural norms but to be sensitive to differences, then change your communication style to a simpler, plainer form in which idiom, jargon and gesture are reduced to make the verbal communication elements more effective. The most important point is to be open-minded and nonjudgmental, while not losing sight of what needs to be done and of what constitutes good FM practice.

  It is not feasible to forecast the numerous cross-cultural scenarios a facility manager could encounter, this topic includes the prominent global challenges. Discussion of these challenges follows. Strategies for effective cross-cultural communication are described later in this topic.

FM Global Challenges

Management Orientation

FM Global Challenges

At a basic level, a facility manager needs to understand how an organization's global **management orientation** influences communication. Recognition of how other concepts such as **cultural diversity**, **language**, **religion**, and **legal and regulatory constraints** also shape communication are important considerations. Discussion of these topics follows.

Management Orientation

The management orientation of an organization impacts its communication practices; that is, what information is communicated, how it is communicated and who does the communicating. Ethnocentric, polycentric, regiocentric and geocentric are four management dimensions of global organizations. A description follows of how these dimensions impact communication can facilitate FM operations.

- **Ethnocentric** - With the ethnocentric orientation, an organization is headquarters driven. Subsidiaries have limited autonomy. Communications must comply with overall organizational objectives and policies. The following example illustrates this.
  - Standards and policies from the home country are applied abroad. A facility manager from headquarters provides constant advice and counsel, the tone being these standards and policies work at home and they should work across international operations.
- **Polycentric** - In a polycentric orientation, the acknowledgement is made every country is different. Each subsidiary is a distinct national entity and given some autonomy. Communications are country specific. The following example illustrates this.
  - FM communications adopt various local preferences and techniques deemed most appropriate for the host country.
- **Regiocentric** - In the regiocentric orientation, regional strategies, structure and autonomy are endorsed. Because subtle country differences within a region are not always obvious, people familiar with the region of operation are involved in communications. Nationals of the region in which operations take place are given more autonomy in communications. The following example illustrates this.
  - FM communications focus on the preferences and techniques of specific geographical regions. The FM regional team adapts the communication to the cultural differences of the country or of the nationals in the region.

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- **Geocentric -** The geocentric orientation supports the unique contributions of all global operations. It recognizes communication practices differ, but no bias exists either for home or host-country preferences in communications. The following example illustrates this.
  - Certain standards and policies, which define the organization and integrate with local customs without offense, are applied regardless of country or region.

Cultural Diversity

Culture is a shared system of values, beliefs and attitudes. It shapes our actions and affects the way we perceive the actions of others. Culture is intuitive, not logical. It can be difficult to explain your native culture clearly to a foreigner. By the same logic, it is unrealistic to think you can fully understand another culture.

Navigating the complexities of cross-cultural communication requires recognizing and appreciating the differences and nuances among people of different national cultures, people from different geographic locations or people from different ethnic groups within the same country. Learning the basics about cultures is important; in some cases, it is critical.

Learning about Other Cultures

Embracing **cultural diversity** ultimately promotes clearer communication, breaks down barriers, builds trust, strengthens relationships, opens horizons and yields tangible business results.

Many companies offer training in different cultures. Depending on the extent of the work with other cultures, training or seeking out a mentor is prudent. If training or a mentor is not viable, many countries have government websites offering cross-cultural insights and tips on international business values, etiquette, customs and protocol, regulatory requirements and more. Private websites also offer additional information.

Patterns of Cultural Diversity

Some fundamental patterns of cultural diversity may lead to communication difficulties. A description of several of these patterns follows. Tips and techniques related to cultural diversity and cross-cultural communication may be included.

- **Different communication styles -** the way people communicate varies widely between and even within cultures.

English is typically considered the international language of business. People from different cultures use English for business communication and express themselves in English based on the style their cultures use.

- **Different communication protocols** - how a communication is channeled and how the style and tone follow specific protocol in a culture.

  Chain of command and hierarchy and who makes a communication are important. The style and tone of a communication must also be culturally appropriate. Some cultures embrace an "open-door" policy where executives are easily approachable. In other cultures, a facility manager cannot directly approach an executive, even in urgency or in important matters. The facility manager must channel the communication through an intermediary director.

- **Different attitudes toward conflict** - some cultures view conflict as a positive thing, while others view it as something to be avoided.

  In many Western cultures, people deal with conflict in face-to-face or virtual meetings and try to work through problems. For instance, a facility manager might identify specific areas for performance improvement during a performance appraisal. In contrast, open conflict about performance in other cultures is generally perceived as demeaning or embarrassing. An indirect, less confrontational exchange would be the favored means to address the conflict. Performance problems might simply be expressed in these cultures as "You can do better."

- **Different attitudes toward disclosure** - In some cultures, it is inappropriate to be candid and open about emotions, about the reasons behind a misunderstanding or conflict or about personal information.

  Asking questions such as "What was the conflict about?" or "What did you say?" may seem natural to some. In other cultures, however, such questions would be considered intrusive.

- **Different time orientation** - The value of time varies widely across cultures.

  In some cultures, punctuality becomes a virtue. Being late for appointments or delaying meetings may be perceived as insulting and wasting someone's time. In many countries, with thousands of years of history, the paradigm is to "take a long view." A meeting missed today can be held tomorrow or next week, the thought being "we have time."

- **Different perception of silence** - Silence may be expected before a response, as a sign of thoughtfulness and deference to the original speaker. At other times, silence may lead to discomfort, annoyance, hostility or unintended consequences.

  In some cultures, 20 seconds of silence is an extraordinarily long time and is awkward. For instance, vendors might perceive silence from a facility manager during negotiations as unhappiness. As a result, they tend to jump in and break the silence, oftentimes conceding points of contention. In other cultures, silence may occur in conversations without creating tension. In some cultures, silence could be used as means of conversation to indicate consent or acceptance.

- **Different perception of humor -** In some cultures, humor may be used to try to build rapport. Humor is not universally accepted as appropriate in all contexts. Attempts at humor in business can be dangerous. Laughter may be perceived as a sign of disrespect.

  A humorous story may be acceptable as a conversation icebreaker in some cultures. For other cultures, the same humorous icebreaker might be offensive.

- **Different norms about "small talk" -** Some cultures cherish small talk; it is a way of showing respect and being polite. Other cultures do not embrace the concept; it is seen as something awkward and unnecessary. While small talk may be the norm in some cultures, lack of small talk in other cultures reflects a reserved nature and respect for another person's privacy.

  In some cultures, small talk might take a long time because all participants ask the same questions of each other - "How are you?" "How are the family, parents and kids?" "How is your health?" In other cultures, asking anything about families or about a specific family member would be considered intrusive and impolite. Additional small talk topics influenced by cultural norms might include work, weather conditions, politics or ongoing public issues.

Language

Theoretically, facility managers share a common language, known as the language of facility management, which crosses cultural boundaries. Despite this commonality, language barriers create situations facility managers need to overcome to succeed in cross-cultural communication. Tips and techniques related to language and cross-cultural communication may be included.

Language is the most conspicuous part of culture. You must learn how to communicate with individuals and groups whose first language, or language of choice, differs from your own.

Many international business experts recommend learning at least some of the language of the country with which you are dealing. The more you speak and understand the local language, the greater your insights and the greater your chances to avoid misunderstandings.

Some distinct challenges exist in learning to speak a second language. For example, people speak different dialects of the same language within countries and regions. In some cultures, variations in language usage take place based on religion, gender or age. In addition, nonstandard forms of language occur, such as slang, euphemisms and idioms.

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Despite the challenges, compelling benefits exist for being proficient in a second language. These benefits include:

- Relying on translators can put you at a disadvantage in important discussions and negotiations.
- Taking the time and energy to learn someone else's language can help to gain the individual's trust and respect.
- Developing language proficiency provides an understanding of the culture, facilitates distance communication and helps in adapting to the culture during business travel.
- Speaking the language of your competitors and your colleagues in a global setting can translate into significant business and career advantages.

It is never too late to connect with other cultures through another language. In the global business environment, the ability to talk to others and gather information beyond the world of your native language and culture helps expand personal and professional perspectives and become a responsible citizen.

Religion

The influence of **religion** is a major consideration in cross-cultural communication. Religion dictates many things, including rituals, holy days, dress and foods allowed to eat. Religious beliefs also influence codes of ethics and moral behaviors, which carryover to the workplace. In some cultures, business activities may be delayed during a workday for prayers. Business dinners are scheduled later in the evening so participants can attend evening prayers. Best practice is to embrace diversity when dealing with individuals of a different faith.

Legal and Regulatory Constraints

Facility managers must appreciate the influence of the **legal and regulatory systems** in all the countries and regions in which the FM organization operates. Policies, negotiations, contracts and other communications may have to comply with multiple legal systems. When conducting business globally, a facility manager must predict the effect of laws or regulations on FM activities. In this area, involving expert country-specific legal counsel is strongly recommended.

Examples of Legal or Regulatory Impact on FM Activities

The following three examples illustrate how legal and regulatory systems impact a facility manager's activities.

- A global organization with headquarters in Brazil must follow Brazilian laws about working conditions. If it has offices or facilities in China and the United States, it must also follow the legal requirements of those countries regarding workforce relations.
- Global organizations located in the European Union (EU), whose member states have harmonized their legal systems to some degree, must recognize any differences existing between the EU and its individual member states. The Acquired Rights Directive is a good example of this.
- Some global organizations must be mindful of extraterritorial laws; those laws extending certain legal requirements of a home country to the activities of its citizens traveling abroad and its entities operating in host countries. The Foreign Corrupt Practices Act and the Sarbanes-Oxley Act are typical United States examples of this.

Tips and Techniques for FM Cross-cultural Communication

No short and easy way exists to learn about a given culture in any depth or to learn a second language. Cultural communication requires time, work and patience. Being cross-culturally aware is very important in helping a facility manager minimize misunderstandings or breakdowns in communication. No matter how culturally sensitive you are, FM must be done economically, compliantly and on time.

Figure 5 illustrates several strategies to facilitate success when communicating in cultures. A brief explanation of each strategy follows.

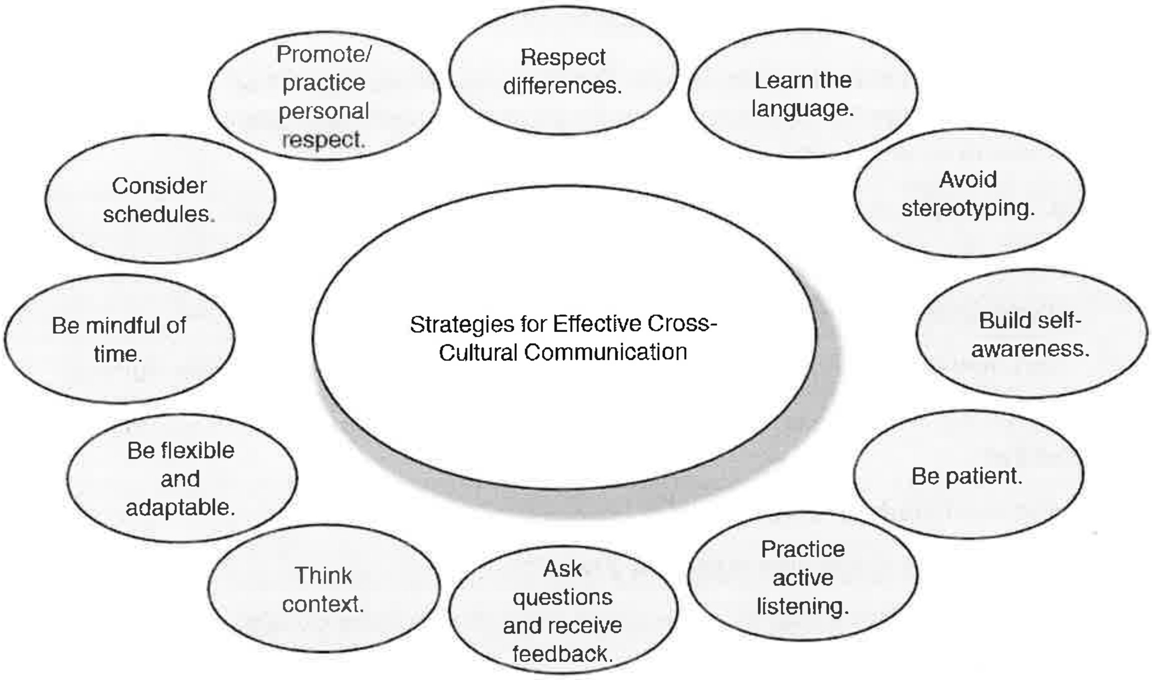

Figure 5 Strategies for Effective Cross-cultural Communication

- **Regiocentric -** Do not criticize local customs. In some countries, a gift is an important symbolic gesture. In other locations, gift giving in a business setting is a rare or inappropriate protocol.

  Tips and techniques to follow include:

  - Learn all you can about the culture.
  - Ask questions to develop cultural knowledge.
  - Study cultural differences.
  - Be conservative and careful.
  - Apologize if your cultural ignorance suggests lack of respect.

- **Learn the Language -** Try to learn a language or some of the common phrases.

  Tips and techniques to follow include:

  - Recognize there may be different requirements between business speech for senior management or executives and words and dialogue appropriate for service providers.
  - Avoid using jargon, slang and other nonstandard forms of a native language.

- **Avoid Stereotyping**

  Tips and techniques to follow include:

  - Think first.

- Stop and suspend judgment.
- Learn from generalizations about other cultures. Do not use those generalizations to stereotype. Do not be condescending and oversimplify ideas in communication.

- **Build Self Awareness**

  Tips and techniques to follow include:

  - Learn and practice
  - Put new knowledge and skills into use to enable improvement at cross-cultural communication.

- **Be Patient**

  Tips and techniques to follow include:

  - Be willing to invest time nurturing a relationship.
  - Recognize when it is at an appropriate stage to move things forward.

- **Practice Active Listening**

  Tips and techniques to follow include:

  - Listen actively and empathetically.
  - Try to put yourself in the other person's position, especially when perceptions and ideas are different from your own.

- **Ask Questions and Receive Feedback -** Many factors shape communication, interpretation of what is intended and how people behave in response. Ethnic background, education, family and personalities shape an individual and are more complicated than a cultural norm could suggest.

  Tips and techniques to follow include:

  - Confirm people understand your intentions.
  - Check an interpretation if you are uncertain what the other person means.

- **Think Context**

  Tips and techniques to follow include:

  - Recognize the complexity of different cultures.
  - Recognize this is where these individuals live, how they live, how the society and politics operate, etc.
  - Discover how important work and society are to them.
  - Discover whether they are family-driven or work-oriented.

- **Be Flexible and Adaptable**

Tips and techniques to follow include:

- Keep questioning your assumptions about the "right way" to communicate.
- Make appropriate cultural adjustments.
- Favor the cultural norms on which a communication or transaction relies.
- Recognize existing cultural mechanisms necessary to get things done.
- Be prepared to operate outside your comfort zone.

- **Be Mindful of Time**

  Tips and techniques to follow include:

  - Discover how a culture perceives and values time.
  - Change your behavior about time accordingly.

- **Consider Schedules**

  Tips and techniques to follow include:

  - Identify special holidays.
  - Understand normal hours of operation.
  - Accommodate time zone differences with appropriate technologies.
  - Consider a rotating schedule when meetings are necessary with people spread across different global time zones.

  Chapter 4, Conducting Effective Meetings, provides information about virtual and global meetings, which can affect scheduling.

- Promote and Practice Personal Respect

  Tips and techniques to follow include:

  - Be aware of age and gender respect as it applies to a specific culture, place and political context.
  - If revered in a culture, age may determine upward mobility. A young manager may not advance over more senior managers even if the younger manager is more qualified. In other cultures, if old people are considered a burden to society, business people may try to hide their age as they approach retirement
  - As a cultural construct, gender is important among cultures. Globally, many people strive to improve the status and quality of life of women.

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Lesson 5: Intergenerational Communication

This lesson focuses on these subjects:

- Awareness of Generational Communication Preferences
- Tips and Techniques for Intergenerational Communication

Introduction: Intergenerational Communication

Generational differences is one of many factors contributing to how we communicate with each other in the workplace. As more people are working beyond age 55, up to five generations coexist in businesses. Table 5 shows the five generations currently in the workforce. The birth year ranges of generations differ depending on the research accessed. For this topic, Pew Research Center's definition of generations is used.

Generation	Birth Years
Silent Generation	1928-1945
Baby Boomers	1946-1964
Generation X	1965-1980
Millennials	1981-1996
Generation Z	1997-2012

Table 5 The Generations Defined

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Awareness of Generational Communication Preferences

Each generation has its own way of communicating. Not every individual will fit perfectly into the associated generation's broad characteristics, each generation displays differentiating communication traits. It is important to understand how people born into different generations communicate when it comes to getting the work done. This helps everyone understand how to communicate with each other.

Communicating between generations is challenging. Awareness of how each generation approaches communication is essential in closing the communication gap. Table 6 lists these approaches.

Generation	Communication Preference
Silent Generation	High level of formality in written and oral communication
Baby Boomers	Formal and direct communication with preference for using face-to-face, phone and email; value background information and details
Generation X	Informal and flexible communication with a preference for using email, phone, instant message (IM or text) and Facebook; value professional etiquette
Millennials	Authentic and fast communication with a preference for using IM, chat, email and Instagram; value efficiency and a digital-first approach
Generation Z	Transparent and visual communications with a preference for using face-to-face, Snapchat, YouTube and FaceTime or other video calling applications; value video, voice-command and a mobile only approach

Table 6 Generational Approaches to Communication

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Harvard Business Review suggests differences in communication preferences and values among generations are small. Considerable variety of preferences and values exists within any of these generational groups. Research suggests workplaces are brimming with age-related stereotypes and beliefs, these beliefs are not always accurate. Not everybody lives up to them. Keep in mind generational traits are clues; they are not absolutes. Individual exposure to and experience with technology also impact communication approaches regardless of generation. Also impacting communication, communication approaches and preference is the proliferation of mobile technology and new communication channels, all of which did not exist most of the twentieth century.

Tips and Techniques for Intergenerational Communication

It is no longer how the communicator wants to deliver the intended message. It is how the receiver most likely consumes messages. For instance, a Baby Boomer who wants to connect with a Gen Zer should not call and leave a voicemail; send an instant message instead. A Gen Zer who wants to contact a Baby Boomer should send an email or leave a voicemail.

Consider the audience. It is necessary to understand the best communication style regardless of generational affiliation for coworkers, managers or subordinates. Individualize communication with them. For example, a meeting with a Baby Boomer boss may call for a more formal tone, while a conversation with a Gen Z or Millennial coworker could be more relaxed.

Match the right channel with the type of information. Communication intensifies when multiple channels combine with the varying communication preferences and expectations of each generation present in the workplace. The following list shows how this can work:

- Phone call is for detailed, long, difficult or emotional conversations.
- Email is for brief, informative or instructional information.
- Chat is for general announcements, news, informal messages, team collaboration and socializing.
- Video (Zoom, FaceTime, Teams) is for long, feedback-rich focused, emotional or difficult conversations.

Respond to communications using the same channel by which it was received. For example, if a Millennial sends an instant message (IM or text), respond by sending back an IM. If altering the communication channel is necessary, recap the previous message in the new channel.

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Be proactive about informing others how to best connect. For instance, as a Gen Z manager, mention a text is preferred over a phone call in your email signature. As a Baby Boomer manager, mention in an outgoing voicemail message email is preferred over voicemail.

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Lesson 6: Issues Shaping FM Communication

This lesson focuses on these subjects:

- Electronic Communication Options
- Workplace Communication Privacy Concerns
- Tips and Techniques for FM Communication

Electronic Communication Options

Ever-changing communication technologies, combined with new challenges confronting organizations, link communication and technology. As a result, a facility manager must be able to participate effectively in all aspects of the electronic office and workplace.

Technology and electronic communication help FM operations by lowering operating costs and increasing the department's visibility. Table 7 identifies some of the key advantages and disadvantages of using technology in FM communication.

Advantages	Disadvantages
• Stimulates employee productivity. • Improves communication efficiencies. • Supports virtual workspaces. • Facilitates hoteling. • Mitigates face-to-face meeting expenses. • Integrates information, functions and systems in innovative and unprecedented ways. • Makes documentation and archiving of communication quick and easy; information can be stored permanently or temporarily on disks or tapes for years or can even be printed and stored in files.	• Fosters perceptions of communication as impersonal. • Removes some nonverbal communication that would add important context. • Leads to information overload for the organization and the individuals. • Requires vigilant learning and/or training to keep current. • Creates various security issues. • Widespread availability invites inappropriate use and overuse for example, bad slide presentations. • Leads to miscommunication or embarrassment if wrong or unintentional electronic communications are sent.

Table 7 Advantages and Disadvantages of Electronic Communication

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At times, a characteristic of electronic communication can be an advantage and a disadvantage as explained next.

Information availability

Faster distribution is an advantage. In some situations, the speed with which the message is transmitted can change the structure of a message and potentially lead to misinterpretation. Take care to ensure data transmitted remains intact. For instance, rich text documents can lose key symbols or marks when converted to plain text embedded within some software.

Information sharing

Broader access to information can be an advantage. Compared to more personal communication methods, confusion or frustration may result from one-way electronic communication which limits opportunities for exchanges or clarification.

Examples of Electronic Communication

The FM department uses a website, portal, email, instant messages and other technology-enabled communication to transfer information to management, occupants, service providers, visitors and others, regardless of location in the world.

The following examples illustrate this concept.

- A text message or email with information can be sent to employee smartphones, tablets or both when they work in the field. This way, there is no delay in getting the needed information to the employee.
- High-quality digital still cameras and video cameras allow a facility manager to provide high resolution pictures and video to help FM staff complete a technical task.
- An occupant receives real-time information by instant message or email about the status of an appointment. In turn, facility occupants communicate their needs to the facility manager in a prompt manner.
- Social media tools such as blogs and video sharing help to extend FM's outreach internally and externally.

Technology-enabled Communication Tools

Many people never consider how much their communication depends on technology. Table 8 depicts an alphabetical list of technology-enabled communication tools a facility manager encounters. You may not use all these communication technologies today, you might have a FM application for them in the future.

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Note: The discussion of technology here focuses on the communication aspects. For information about facility management business and operational technologies, refer to the Facility Information Management and Technology Management competency.

Technology-enabled communication	Description
Audio conferencing/Teleconferencing	• Delivers a simultaneous presentation to multiple sites distributed via audio phone or other audio or satellite.
Blog (short for "Web log")	• Provides an informal communication channel with stakeholders. • Allows users to create and display online posts/logs. • May include multimedia and allow readers to comment. • Can be moderated to weed out inappropriate contributions.
Book reader	• Turns a text document into an audio document. • Plays information back on the user's computer or portable device with the quality of a human-like voice.
Business portal	• Allows authorized users to access restricted content or information on an organization's Web site. • Provides a single gateway to access different applications.
Cloud computing	• Allows uploading documents and files to a network of computers that make up a cloud. • Decreases hardware and software demands on the user's side as storage and applications are handled by cloud Web portals instead. • Facilitates access and sharing of information and data.
Computer avatar	• Provides a personalized graphic file or rendering that represents a computer user. • Allows fully rendered interactive characters and/or objects in virtual worlds. • Allows Web users to load static graphics files as avatars for example, a picture of themselves or other monikers.

E-mail (electronic mail)	• Provides a standard form of business communication for short messages that require action. • Instantaneous and may include embedded graphics and attachments.
Electronic bulletin board	• Allows users to gather information, place and read electronic messages from others and download available files.
Extranet	• Provides a private wide area network (WAN) using the Internet to link an organization with stakeholders they deal with regularly.

Table 8 Forms of Technology-mediated Communication

- File hosting and sharing
  - Enables users to store and share documents, presentations and multimedia files with others.
  - Provides a modest amount of free storage; offers paid subscriptions for greater storage.
  - Allows media to be played/viewed from any Web browser; may be selectively available via password or open to the general public.
- Instant messaging (IM)
  - Consists of sending real-time messages to another Internet user through websites or instant-messaging applications.
  - Comparable to chatting in a private chat room, but instead of anyone being able to join the conversation, IM includes only people whom the user has invited.
  - Allows users to create a list to keep track of welcome guests; IM alerts users when a new message is received.
- Intranet
  - Provides an organization with a private, secured computer network system that operates on a local area computer network (LAN).
  - Includes Internet Web site-like navigation and functionality and features such as internal e-mail, news groups and chat facilities.
- Internet forum
  - Allows users to post a topic for others to review.
  - Allows other users to view the topic and post comments in a consecutive manner, one by one.

- Live chat (for service)
    - Offers service in real time or enables visitors to leave messages when offline, forwarded to e-mail.
    - Provides secure and private instant messaging.
- Mailing list server
    - Automatically broadcasts e-mails to everyone on a given list.
- Pager
    - Provides a reliable and easy way to send out a one-time paging signal, rather than the two-way connection of a cell phone.
    - Works in most locations such as buildings and basements; not dependent upon location.
    - With digital pagers, signals may be sent on redundant channels where a signal usually goes out on two to three different frequencies with different propagation characteristics.
- Podcasting
    - Provides a way to publish compressed digital audio and video broadcasts or feeds via the Internet.
    - Allows users to download and listen/watch on a computer or a portable device, similar to a Webcast that uses streaming.
- Social bookmarking
    - Provides a method for Internet users to store, organize, search, manage and share bookmarks of Web pages.
    - Tags/labels bookmarks so they can be sorted by topic.
    - Allows multiple individuals to save bookmarks on similar information to the same site.
- Social media and social networking/Social technologies
    - Describes a variety of online Internet technology platforms and communities that people use to communicate and share information and resources.
    - Provides live interaction as users can send and view updates from other users.
    - Can include short text-based posts, audio, video, images and other online multimedia applications.
- Streaming media
    - Sends media in a continuous stream that is played as it arrives.
    - Allows a Web user to see video and hear audio without having to wait to download a large file.

- Text messaging (texting)
  - Sends short text messages between cell phones or other handheld devices.
  - Usually includes all 26 letters of the alphabet and 10 numerals.
  - May include image, video and sound content.
- Video conferencing
  - Uses cameras and software to simulate a face-to-face communication or meeting without having to be in the same location.
- Web conferencing
  - Facilitates real-time interactions that take place over the Internet using integrated audio and video, chat tools and application sharing.
  - Includes the ability to centrally control the simultaneous presentation of text, graphics, images and video on every participant's screen from one location.
- Website
  - Facilitates cost-effective, paper-free communication.
  - Provides an ideal place to include the various forms of communication an organization uses such as articles, compressed digital audio and video, newsletters and more.
- Webcasting
  - Uses the Internet to broadcast delayed or real-time compressed digital audio or video programming.
  - Allows users to listen/watch streaming feed on a computer or a portable device (similar to a podcast that uses downloads).
- Webinar
  - Provides a way for people to conference or train together over the Internet.
  - Allows a meeting host to broadcast a presentation to the attendees through a live feed.
  - Substitutes face-to-face conversation with discussion boards to exchange information and knowledge.
- Whiteboarding
  - Provides an online version of the traditional wall-mounted whiteboard.
  - Allows chatting and takes brainstorming to a virtual interactive level.
  - Allows more than one user to mark up the board at the same time.
  - Keeps all changes in sync in near real time.
  - Saves the final product and allows for printing.

- Wiki
  - Provides a collaborative website with content that can be edited by its visitors.
  - Promotes knowledge sharing.

Workplace Communication

Workplace Communication Privacy Concerns

Many employees believe they have a right to privacy for their individual workstations, computer files, email, telephone conversations, etc. Employers have the legitimate right to monitor employee activity in this area and to inspect and review all related records and costs.

Managing workplace privacy in communications involves balancing the legitimate right of employers to protect their assets and safeguard their workplaces with reasonable employee expectations of privacy and acceptable use of technology. Magnifying this challenge is the availability of technology which makes it possible for employers to track all employee email, Internet and telephone use without employees knowing they are being monitored.

Workplace Privacy Issues

Employee use of email, voice mail and the Internet has created multiple workplace privacy problems. Some of the problems include:

- An employee's personal use of email and the Internet during business hours affects the employer's productivity and profitability.
- Employee misuse of electronic communication media places organizations at risk for legal liability and breaches of data security.
- Employers can face claims of sexual harassment, discrimination, defamation, copyright infringement and other improper conduct arising from employee misuse of computerized communications.
- Employers must be concerned with protecting trade secrets and proprietary information.

Examples of Workplace Monitoring Regulations

- In the United States, workplace monitoring is subject to various federal and state laws granting specific privacy rights to employees and placing obligations on employers, especially regarding electronic monitoring.

- In the European Union (EU), the Data Protection Directive (DPD) sets stringent restrictions on what personal information can be collected and stored. Organizations operating in Europe must follow strict rules governing the handling of personal information, such as phone numbers, ethnicity and medical data. These requirements are stricter than those in other countries and can have a profound impact on how facility managers working in a global environment do their jobs.

Tips and Techniques for FM Communication

To reduce legal liabilities, organizations often set policies reflecting existing monitoring laws, business and privacy organization recommendations and research recommendations. It is important facility managers are aware of and comply with organizational monitoring policies. To achieve this, a facility manager should do the following:

- Understand what is governed by the monitoring policy for example, electronic communications, phones, voice mail, email, Internet and computer use.
- Recognize monitoring and searches can occur at any time for any reason and be aware of company policies and restrictions.
- Understand the organization's computer and phone systems are the property of the organization, notwithstanding the fact employees have their own passwords or keys for accessing the systems.
- Understand the organization's computers, phones and other equipment are intended for business-related use with limited personal use considered acceptable while at work.
- Refrain from transmitting or downloading offensive or otherwise unlawful material.
- Be aware of the privacy policies on websites visited and how they protect or share information.
- Refrain from transmitting or disseminating the organization's confidential information or trade secrets to any outside source.
- End any expectation of privacy while using the organization's computers, telephones or mobile devices.

It is inappropriate for a facility manager to undertake monitoring of suspected behavior. If improper staff or service provider behavior is suspected, a facility manager should involve human resources.

Even if an organization lacks a formal policy about privacy and workplace communications, a facility manager should protect legitimate business interests, be guided by common sense and encourage others to do the same.

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A facility manager should exercise good judgment and common sense with social networking. Some employers do not embrace social media in the workplace, resulting in network website restrictions. Regardless of whether an organization has social networking guidelines, a facility manager should do the following:

- Keep social networking from interrupting productivity, a fine line may exist between interrupting productivity and enhancing productivity with social technologies.
- Be polite and responsible.
- Pause before posting.
- Be mindful of the site's privacy settings.
- Refrain from anonymity.
- Be accountable and correct mistakes.
- Use disclaimers or speak in the first person to make it clear the opinions expressed on social media are yours, not those of your employer.
- Remember the audience and realize what is being said might create a perception about the organization and the FM function.

Workplace privacy is likely to remain a communication issue as communication technologies become more sophisticated and make it easier to monitor employee performance and communication electronically. A facility manager should work to ensure all staff and service providers recognize prudent behavior and conduct themselves appropriately.

What Would You Do in This Situation?

You are facility manager for a company with multiple overseas locations. You are beginning negotiations with a service provider for your company's office building in Brazil. What would you want to learn about the person's cultural background? How would you find this information?

Chapter Summary

Congratulations! You completed Chapter 1 of IFMA's Communications Course.

This chapter focused on how communication takes place. It also examined the importance of context in influencing the success or failure of the information to achieve intended actions and to be put to useful purposes. The learning objectives were to:

- Discuss the basic communication process and how it relates to FM.

- Describe how communication takes place in organizations, including barriers inhibiting organizational communication.
- Identify the factors impacting effective and efficient communication.
- Discuss how communication conveys the intended message to the intended audience.
- Explain the role of active listening in effective communication.
- Explain key aspects of cross-functional communication.
- Explain key aspects of cross-cultural communication.
- Recognize prevailing issues shaping organizational communication.

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Chapter 1: Progress Check

1. The "grapevine" in an organization is primarily about personal matters.
   a. True
   b. False

2. What action **best** demonstrates active listening?
   a. Respond so speaker knows you understand.
   b. Interrupt speaker to tell what should be done.
   c. Assume knowing what speaker will say next.
   d. Maintain outward appearance of paying attention.

3. What power in cross-functional communication stems from knowing your stakeholders?
   a. Coercive power.
   b. Asymmetrical power.
   c. Structural power.
   d. Relationship power.

4. Polycentric, ethnocentric and geocentric are three types of management orientation. What is the fourth type of orientation?
   a. Parochialism.
   b. Encoding.
   c. Urgency.
   d. Regiocentric.

5. What experience impacts communication preferences regardless of generation?
   a. Exposure to new channels.
   b. Exposure to the grapevine.
   c. Exposure to filtering.
   d. Exposure to technical jargon.

6. What **best** describes a workplace privacy problem caused by employee use of electronic communication?

   a. Risk for resistance to change.
   b. Risk of data security breach.
   c. Risk of mishandling grapevine.
   d. Risk of exposure to noise.

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Chapter 2: Business Writing

Lessons

- Objectives
- Lesson 1: Business Writing Fundamentals
- Lesson 2: Increasing the Ability to Influence, Persuade and Negotiate
- Lesson 3: Preventing Plagiarism and Copyright Infringement
- Lesson 4: Selecting and Evaluating Reliable Sources of Information

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Objectives

Chapter 2: Objectives

On completion of this chapter, you will be able to:

- Explain writing principles supporting good business writing.
- Understand how business writing skills improve influence, persuasions, and negotiation with stakeholders.
- Determine what is necessary to prevent plagiarism and copyright infringement.
- Locate reliable and credible sources of information.

This chapter focuses on how communication takes place. It also examines the importance of context in influencing the success or failure of the information to achieve intended actions and to be put to useful purposes.

Globally, facility managers write thousands of emails, instant messages, memos, reports, proposals and plans. Chapter 3, Written Business Communication to Achieve Results, covers these forms of written business communication. Facility managers also design presentations and run meetings. Chapter 4, Conducting Effective Meetings, focuses on these kinds of business communication. All in all, effective writing helps you to convey the intent of your communication.

The guidelines presented in Lesson 1 improve your ability to sell your FM ideas to stakeholders, so they understand what you want them to know. Lesson 2 discusses achieving your goals by increasing your influencing, persuading and negotiating skills. Lesson 3 provides discussion on preventing plagiarism and copyright infringement. Finally, Lesson 4 describes how to find reliable and credible sources of information to use in written and verbal communication to support your ideas and recommendations as applicable.

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Lesson 1: Business Writing Fundamentals

This lesson focuses on these subjects:

- Using Plain Language
- Content Principles
- Organization and Format Principles
- Style Principles

Introduction

This lesson examines the business writing components to know and use to make communication effective.

As shown in Chapter 1, barriers to communication prevent the effective exchange of information. Other factors for example, status, interest, attention span, education, culture, experience, can influence how much information is held in human memory. To get action from FM stakeholders, it is important to do the following:

- Make intended points quickly and succinctly.
- Require minimum time and effort from the reader.

Clarity is essential, keep in mind what the audience needs to know to act on; in other words, what must be accomplished with the communication. For instance:

- Is the board being asked to act on a business case recommendation to buy a new chiller?
- Are the FM staff being reminded about regulations specifying, when to wear a protective helmet on the construction site?

Once the reason for the communication is determined, your goal of getting the desired results increases. Appropriate writing for the audience is well-ordered and relevant.

For the purpose of this lesson, business writing principles are grouped in the following categories:

- Content Principles
- Organization and Format Principles
- Style Principles

Before discussing these principles, it is beneficial to examine the subject of plain language to lay a foundation for the balance of this lesson.

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Using Plain Language

The point in writing is to communicate clearly and concisely. **Plain Language, Plain Writing** or **Plain English,** achieves this. Considering the increase in global collaboration there are increasing opportunities for communication breakdown.

The Plain Language Association International (PLAIN) states, "A communication is in plain language if its wording, structure, and design are so clear that the intended audience can easily find what they need, understand what they find, and use that information." This means writing content that is logically organized and understandable by the audience on the first reading.

Writing objectives should be clear and precise. An error that writers make is using long words to impress the reader. Writers believe this demonstrates intelligence. Small words are generally clearer and easier to understand. Instances do happen when long words or technical terms need to be used, if the meanings are precise and short words are unable to convey the message. Complicated or abstract terms can lead to communication barriers. Avoid words not used regularly in conversation, legal-sounding words, or words from foreign languages. Table 9 lists several examples.

Avoid This ...	When You Could Say ...
Considerable	Much
Correspondence	Letter
Currently	Now
Despite the fact that	Although
Finalize	Finish
In as much as	Because
In lieu of	Instead
In my opinion, I think	I think

Avoid This ...	When You Could Say ...
In the not-too-distant future	Soon
Initiate	Start
Perform an analysis of	Analyze
Prior to	Before
Provided that	If
Utilize	Use
With regard to	About

Table 9 Tips for Avoiding Verbosity

- Additional Tips and Techniques for Using Plain Language
  - Identify the average reader's level of technical knowledge to ensure that the language connects with the level of knowledge.
  - Strive to communicate with the audience in uncomplicated and accurate language.
  - Use appropriate sentence construction to produce coherent sentences and eliminate unnecessary words.

Before	The following executive summary is intended primarily to highlight the causes of the accident as outlined elsewhere in this investigative report.
After	The executive summary highlights the causes of the accident investigated in this report.

  - Use active voice. It is more direct and concise, and easier for readers to understand.
  - Use the second person (you/your) to write directly to the reader and to make the writing relevant to the reader.

Replace jargon and complex wording with familiar, concise words or terms when possible.

Avoid creating jargon or acronyms only unique to your topic. Although they may save a few words, they force readers to take more time and effort to understand your communication. Use acronyms and other abbreviations if they are familiar to the readers.

Use consistent terminology for the same thing such as car, vehicle, automobile – choose one.

Use the appropriate plain-language equivalent for FM terminology with audiences unfamiliar with this terminology. If an alternative does not exist, define or explain a technical term on its first use in the communication.

- Global English
  - In the global marketplace, it may be unusual for the audience to consist solely of native speakers of English. Avoid most barriers related to cross-cultural communication by using Global English in conjunction with plain language. A brief discussion of Global English follows.

  Global English refers to written English a writer optimizes for the possible translation of the communication for the global audience. The writer:

    - Eliminates ambiguities impeding translation.
    - Eliminates unnecessary inconsistencies.
    - Makes English sentence structure explicit and easy for non-native and native speakers to analyze and understand.
    - Minimizes use of uncommon non-technical terms and unusual grammatical constructions non-native speakers, even those fluent in English, are unlikely to know.

  - Global English makes communication clearer and readable for native speakers. This should not be overlooked, because native speakers of English may constitute most of the readers for your communication. Global English makes communication, even if not scheduled for translation, more readable for non-native speakers who are reasonably proficient in English.
- Benefits of Global English

  Global English provides several additional benefits, depending on the type of communication created.

  - Injuries, losses and costly legal liabilities caused by unclear communication and by incorrect translations are avoided.
  - Clearer, consistent communication reduces calls for service delivery.

- The audience is better able to find the information needed because inconsistencies in grammar are eliminated.
- Translation quality is less of a concern because ambiguities and complex sentence structure which can lead to incorrect translation are eliminated.

Content Principles

Content Principles

Most FM business communication demonstrates a challenge with expressing ideas or content in an engaging and authoritative way. The following section contains several tips and techniques strengthen your writing as you learn to organize and express ideas clearly and concisely.

Have a Clear Purpose

Ask certain questions to ensure the communication has a **clear purpose**:

- What is the reason for writing this communication?
- What do I hope to accomplish?
- Who is the audience?
- What are their interests?
- How much do they know already?
- What do they need to make it easy for them to understand or act?
- Do you want to:
    - Gain support for a change?
    - Show how proactive the FM function is?
    - Ensure instructions will be followed?
    - Justify actions already taken?
    - Influence the reader to take some action?
    - Deliver good or bad news?

After considering these questions, list the important points to cover, then put them into an outline. Further discussion on outlining appears under Content Organization later in this lesson.

Be Audience Focused

In Managing Facilities and Real Estate, author Michel Theriault points out the importance of **audience focus** in FM business writing. Theriault makes the following points:

- Know what influences an audience before you can influence them.
- Communicate with the audience in a way they understand.
- Understand the type of information, level of detail, tone, word choice and the message influence, how the audience receives what you want them to know.
- Support your purpose with the content you provide.
- Speak the audience's language and focus on information and issues important to them, not on what you find interesting or comfortable discussing.
- Outline clearly what you expect of the audience and make it easy for them to act.

The following three examples illustrate the concept of being audience focused.

1. In a business case to request upgrading a facility HVAC system, the board of directors would want to know what decisions need to be made and what impact the decisions would have on the facility. The document the facility manager prepares should include facts and examples meaningful to board members. The facts and examples should also support the purpose of the case. Confusing jargon should be avoided. The board should clearly understand what they need to do.
2. An engineering department is upgrading furniture. After meeting with the department head, the decision is made to add a few more personnel to the department. This translates to a smaller footprint for each workstation. The facility manager should ensure the department head communicates to the engineering team the necessity for these changes. In addition, the facility manager should provide some solutions to the department head to help with the loss of space.
3. In a written communication to all employees announcing a major building restacking, the facility manager should communicate clearly what the audience needs to know. The audience will want to know how the restacking impacts them. If they are impacted, they will want to know where they will be located. In the initial communication, instead of trying to tell the audience everything about the restacking project, such as final locations, schedule, what the responsibilities are for each employee being moved, the facility manager chooses to announce the project in general terms and directs the audience to the FM department's intranet site for more detailed information.

Include a Key Message

The communication includes what you want the audience to know and remember. The **key message**, stated at the beginning of the communication, is clear and concise. It is based on

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the purpose and the understanding of the audience. In addition, the message is an overview of important points. A key message is compelling enough to gain the reader's attention and encourage reading the entire document. The rest of the communication provides supporting detail.

Longer documents, such as reports and proposals, begin with an executive summary to provide an overview of the message conveyed in the communication. The executive summary is the only section decision makers read to determine whether action is warranted. Technical papers begin with an abstract to provide the reader with a brief overview of the message.

Stay on the Message

Many business communication documents tend to drift and contain unnecessary information obscuring their intent. To stay on message while writing the document, use the following strategies:

- Maintain a solid connection to the key message.
- Skip unrelated or loosely related subjects.
- Ensure supporting data is linked to the key message.

Vary Sentence Length

An indirect way to make your writing ineffective is never to vary the length of your sentences. A general guideline for business communication is to keep most sentences you write to 15 to 20 words. Too many sentences of the same length and structure can be monotonous for the reader. All short sentences make the writing choppy. All long sentences make the writing hard to read. Varying sentence style and structure reduces repetition and increases emphasis. Long sentences work for including a lot of information, while short sentence work to maximize crucial points.

Well-constructed long sentences can be easy to understand. Poorly worded short sentences can be confusing. Table 10 lists tips to help discover the right mix of long and short sentences for copy.

Regarding Long Sentences ...	Regarding Short Sentences ...
• Use long sentences to slow down the pace or convey descriptive information. • Craft a long sentence carefully and read it aloud. (Do you run out of breath or want to pause? If you do, then it is probably too long.) • Follow it up quickly with a short sentence. • Eliminate wordy phrases or redundancies. • Change a comma to a period to break it into two or more shorter sentences.	• Use short sentences to emphasize ideas. The shorter the sentence, the harder it hits. For example, a one-word command such as "Stop!" is emphatic. • If sentences are getting too short and choppy, look for ways to change a period to a comma, or a pair of commas, to convert two or three short sentences into a longer, more graceful sentence or full-blown thought. • Do not equate short or simple sentences with amateurish writing.

Table 10 Tips for Varying Sentences

Choose the Right Word

The following tables list several words and phrases causing perpetual problems in FM communication. Explanations of the meaning and usage are included.

Style guides you can purchase include additional problem words. The Resource Center contains a link to a writing style guide and dictionary of Plain English. Discussion of organizational style and style books follows under Organization and Format Principles.

Word or phrase	Example
accept, except	
Accept is a verb meaning "to receive willingly."	Please accept my apology.
Except is a preposition meaning "but."	Everyone except the vice-president attended the meeting.

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Word or phrase	Example
Except can be a verb meaning "exclude."	The facility excepts occupants with impaired credit.

Table 11 Accept, Except

Word or phrase	Example
affect, effect	
Affect, used as a verb, means "to influence."	Inflation affects our sense of security.
Affect, used as a noun, means "a feeling or an emotion."	To study climate affect, FM examines the facility's temperature gauges.
Effect, used as a noun, means "result."	Inflation is one of the many effects of a changing real estate market.
Effect, used as a verb, means "to make or accomplish."	Inflation has effected many changes in the way we spend money.

Table 12 Affect, Effect

Word or phrase	Example
assure, ensure, insure	
Assure means "promise." It guarantees something.	I assure you satisfaction if you buy this property,
Ensure and insure mean "make secure." Ensure expresses an idea about how something is made certain. Insure is used in specific business contexts. .	If you insure the property, you will ensure the organization is protected against loss.

Table 13 Assure, Ensure, Insure

Word or phrase	Example
can, may	

Word or phrase	Example
Can refers to "ability." May refers to "possibility or permission."	I see you can Rollerblade without crashing into people; however, you may not Rollerblade on the promenade.

Table 14 Can, May

Word or phrase	Example
continual(ly), continuous(ly)	
Continual means "repeated regularly and frequently."	The facility manager continually checked the cell phone for new email.
Continuous means "extended or prolonged without interruption."	The facility alarm made a continuous wail in the night.

Table 15 Continual(ly), Continuous(ly)

Word or phrase	Example
data	
In the past, data was used as the plural of datum, and it is still treated as plural in scientific writing. However, it is becoming more common to treat data as singular.	The data is backed up daily.

Table 16 Data

Word or phrase	Example
e.g., i.e.	
e.g. means "for example." To eliminate confusion, consider writing out for example.	Departmental policies all have short names (e.g., Absenteeism, Dress Code, Safety, Vacation).
i.e. means "that is" or "in other words." To eliminate confusion, consider writing that is, or in other words.	He prefers shorter sentences (i.e., nothing longer than 20 words).

Table 17 E.g., I.e.

Word or phrase	Example
hopefully	
Hopefully means "with hope" or "in a hopeful manner." Often the word is misused to mean "It is hoped. "	We waited hopefully for our ship to come in [not Hopefully, our ship will come in.]

Table 18 Hopefully

Word or Phrase	Example
irregardless	
This construction is a double negative because the prefix ir- and the suffix -less are negatives. Use regardless instead.	Regardless of what we suspect, it's still just conjecture.

Table 19 Irregardless

Word or phrase	Example
preventive, preventative	
In standard English, these words do not differ in meaning. Some grammar usage guides criticize preventative as improper.	In FM-speak, use preventive, as in preventive maintenance.

Table 20 Preventive, Preventative

Word or phrase	Example
principal, principle	
Principal, used as an adjective, means "most important." Principal, used as a noun, means "the head of an organization" or "a sum of money."	Our principal objection to the school's principal is his actions are unethical.
Principle is a noun meaning "a basic standard or law."	We believe in the principles of honest and fair play.

Table 21 Principal, Principle

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Use the Active Voice

The term **voice** refers to the relation of the sentence's subject to the action of the verb associated with the subject. A verb is in **active voice** when the subject does the acting. The verb is in **passive voice** when the subject is acted upon by something.

Active voice is preferred because it is easier to understand, subject first, action second and object of the verb last. Active sentences follow the "who does what" order. "Who" is the subject or order. An active sentence adds energy to writing and makes writing less formal and more conventional. It is clear and direct and minimizes the number or words.

Often, passive writing is roundabout and confusing. It tends to be wordy. Some passive sentences are useful. This occurs in instances where the subject is not the main concern or where the subject is intentionally concealed. Consider the topic/subject, the audience and your goal in writing when deciding whether passive voice is acceptable.

The change of voice does not alter the sentence meaning, but it shifts the emphasis. For instance, in the active voice version of the first example in Table 22, the emphasis or center of interest, is on the HVAC contractor. In the passive voice version, the center of interest is on the ventilation problem.

Active Voice Examples	Passive Voice Examples
The HVAC contractor analyzed the ventilation problem.	The ventilation problem was analyzed by the HVAC contractor.
We provide occupants with custom-designed service solutions.	Service is provided to occupants in the form of custom-designed solutions.
Regular vehicle maintenance cuts gas transportation costs.	Gas transportation cost savings were realized through regular vehicle maintenance.
All personnel must wear complete uniforms.	Complete uniforms must be worn by all personnel.

Table 22 Examples of Active Voice versus Passive Voice

Revise Copy

Revising what you compose is a critical part of writing; it helps put what you want people to know into understandable, readable content. Typically, revising copy requires more than one review of the material.

Slipshod writing, regardless of how minor the errors, can undermine your efforts. It gives the audience reason to disregarding the message, leading the audience to question the amount of care and thought put into the copy. Readers who perceive this, place little credibility in the writer's ideas.

When the first draft is complete and if time allows, set it aside to look at it again with a fresh perspective. Review the copy and check for obvious mistakes in punctuation, grammar and spelling. Pay attention to words spelled correctly but are the wrong word for example, writing "their" or "they're" for "there". Read through the document to ensure that all the composition pointers covered in this section of Lesson 1 are addressed. If time allows, have another person read the content. Check for organization and format principles, and style principles. Discussion of these principles begins next.

Organization and Format Principles

One of the challenges in effective business communication is to understand the audience's perspective, experiences or motivations before composing what they need to know. This entails writing down the right words with the right emphasis in a logical order. The sequence includes effective introduction, transitions and summary points. It is important to present thoughts in a visually pleasing way. Organization and format, essential properties in good business communication, help accomplish this.

Figure 6 illustrates the principles of organization and format and their interconnectivity. Discussion of each principle in the form of tips and techniques follows.

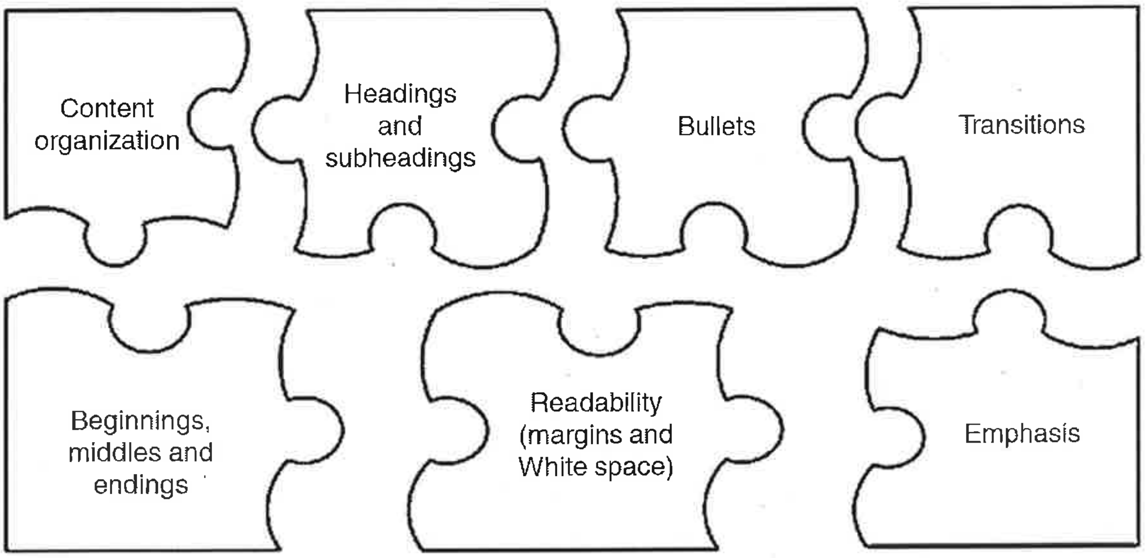

Figure 6 Effective Organization and Format Principles

Content Organization

Organization is essential to the success of communication. A logical method of organization satisfies the reader's need to move smoothly from the beginning to the end. Choose the method appropriate to the subject, audience and purpose.

Different ways to organize content exist. Consider the audience and the purpose of the business communication. Determine a structure fitting the material, keep in mind senior management may only read the first paragraph. Before discussing a method for organizing content, look at an example to lay the foundation for the method.

Example for FM Content Organization

- One of the goals in an organization's strategic plan is to become energy efficient. The vice president of operations assigns you, the facility manager, the task of writing a document analyzing the rising electrical costs at the property and suggesting a plan for the property to become more energy-efficient. You know what to write, but you are unsure how to present the information sensibly and logically. No matter how persuasive your content is, you could fail to influence the audience if you do not structure the information in a compelling and easy-to-read way. What can you do?

Outline the content before writing:

- Start with what is important to the audience.
- Order the material as the audience would logically think about the subject.

Content Outlining

This section provides ways to create outlines. Once you complete the outline, ask the following questions regardless of the type of outline you create:

- Are these all the topics and subtopics to be covered?
- Are the topics in a logical sequence?
- Is there any unnecessary information?
- Is there a clear beginning, middle and end? Additional information about beginnings, middles and endings is provided later in this section.
- Outline of Key Topics
  - Creating a topical outline helps organize the content so that it is reader oriented. The problem/need should be stated clearly in the introduction. The supporting facts should follow in the body. The required action and cost should be in the conclusion. Table 23 is a sample outline based on key topics.

Controlling Energy Costs at XYZ

I. Overview
A. Why something must be done
B. Current energy costs
C. Percent of the facility and property budget
D. Potential savings that can be realized from taking action

II. Where the organization uses energy
A. Lighting costs
B. Natural gas expenses
C. Trends with current costs

III. How to reduce costs
A. Efficiency
B. Conservation

IV. Due diligence actions
A. Projected capital expenditure
B. Intended (anticipated) results
C. Alignment to organizational objectives
D. Return on investment
E. Financial risks

V. Action plan
A. Next steps
B. Time frame
C. Responsibilities

Table 23 Sample Outline Format of Key Topics

- Outline of Key Questions
  - Another way to organize content is to write topics as a series of questions where main questions and secondary questions replace the Roman numeral and capital letters used in the topical outline. As with the topical outline, the problem/need should be stated clearly in the introduction. The supporting facts should follow in the body. The required action and cost should be in the conclusion. is a sample outline based on key questions.

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Controlling Energy Costs at XYZ

Main question Why do energy costs need to change at XYZ? Secondary questions What are the current energy costs? What percentage of the facility and property budget are the current energy costs? What potential savings can we expect from acting?	**Main question** What is the projected capital expenditure? Secondary questions What are the intended (anticipated) results? What are benefits to the organization? How is the project aligned to organizational objectives? What is the expected return on investment? Are there any financial risks?
Main question Where is the electricity being used? Secondary questions What are current lighting costs? What are current natural gas expenses? What are current trends in energy costs?	Main question How do we move forward? Secondary questions What are the next steps? How long will the project take? Who needs to be involved?
Main question How can costs be reduced? Secondary questions How can technology improve efficiency? How can conservation change behavior to use less energy?	

Table 24 Sample Outline of Key Questions

- Outline of Key Questions
  - What if you find yourself in situations where you are unfamiliar with the audience? What if you need to write a single document to go to multiple audiences? Table 25 describes ways to organize information, including examples of when they are appropriate to use.

Structure	Description	Can Be Used for ...
Inverted pyramid/traditional news story format	Lead paragraph summarizes the content Provides relevant who, what, when, where, why and how aspects of the information Presents information in order of decreasing importance	Newsletters, memos, letters, reports and press releases

Problem/solution	Begins with a problem/need and moves toward the solution and results/benefits	Reports, case histories and troubleshooting documentation
Inductive order	Starts with specific statements, examples or evidence Leads to the general conclusion or principle the evidence suggests	Newsletters or trade articles
Deductive order	Starts with a broad generalization (e.g., a theme you want to support or a point you want to make) Provides logical supporting facts and observations Ends with specific statements or recommendations	Letters or other communications intended to persuade and influence
Priority order	Ranks issues, problems, concerns, recommendations or other items from most important to least important	Summary of customer satisfaction survey findings or letters and memos recommending a series of steps or actions
Chronological (time) order	Presents information in the order in which it happens	Meeting minutes
List order	Lists key points in the order they are covered	Straightforward recommendations (e.g., five ways to improve customer service)
Alphabetical order	Simple A, B, C, and so on	Directories of services, help documentation and glossaries

Table 25 Content Organization Approaches

Headings and Subheadings

Headings represent the major topics of a document. They signal topic changes within the body of the document. **Subheadings** indicate a new subtopic under the heading.

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No one format for headings is correct. Whatever format is selected, use it consistently for all documents requiring headings. Depending on the document and the audience, headings and subheadings may be:

- Concise and to the point.
- Longer and more descriptive.

Headings and subheadings serve several important purposes:

- They break up large amounts of text into shorter sections, which makes the information easier to read.
- They logically guide the reader through the content according to the structure.
- They provide quick reference points and help the reader locate specific content.
- They allow the reader to get the general gist of the content by scanning the headings and subheadings in sequence.

Headings and subheadings do not substitute for content discussion. The audience should be able to read the text as if the headings and subheadings were not present.

Lists

Vertically stacked **lists** of words, phrases and other items are often highlighted with bullets, numbers or letters. Lists add variety to text. They break up complex statements by focusing on such information as sequential steps, materials or parts needed, questions, and concluding points and recommendations. This makes the material easier for the audience to read, navigate and understand. Lists give readers' eyes a break from repetitive or dense paragraphs of text.

- Use a **bulleted list** where the order of the items is unimportant.
- Use a **numbered list** to:
  - Display steps in sequence.
  - Present checklists.
  - Suggest recommendations.

Tips and Techniques for Formatting Lists

- Keep items in a bulleted or numbered list parallel.
- Make all the listed items fragments, sentences or questions. If there are two sets of bullet points in a document, it is not necessary to make them consistent with each other, just within themselves.

- When the lead-in is a complete sentence and the list items are phrases, the lead-in ends with a colon, the list text starts with uppercase letters and there are no periods after the text.

Example: There are four types of work in a typical office:

- Heads down
- Collaborative
- Learning
- Socialization

- When the lead-in is an incomplete sentence completed by the list text, the lead-in ends with a colon, the list text starts with uppercase letters and there are periods after the text.

Example: In a balanced fire safety solution, features needing consideration include:

1. Means of escape.
2. Fire alarm and automatic fire detection.
3. Behavioral response of occupants.
4. Fire development and containment.
5. Structural response to fire.

- When the lead-in is a complete sentence and the list items are complete sentences, the lead-in ends with a colon, the list text starts with uppercase letters and there are periods after the text.

Example: There are several ways to acquire space for our headquarters:

- Lease and renovate an existing building/space.
- Build new space in a new leased building.
- Purchase an existing building and renovate.
- Plan and build a new building to our specification.

Transitions

Transition is a phrase or word used to achieve a smooth flow of ideas from sentence to sentence, from paragraph to paragraph, and from subject to subject. Transitions help the reader follow the sequence of ideas through the communication. Without transitions, it becomes difficult to find the link between ideas. It may cause the writing to seem choppy.

Use transitions when they accurately present the relationship between what has been said and what will be said. Table 26 lists several useful transitional words and phrases in alphabetical order.

admittedly	for instance	no doubt
although	furthermore	nobody denies
as a result	however	therefore
but	if	thus
certainly	in addition	until that time
consequently	in fact	whether
finally	needless to say	while
for example	nevertheless	yet

Table 26 Transitional Words and Phrases

Examples of Transitions

The following two examples illustrate the relationship between what has been said and what will be said.

- The FM department has controlled property expenses. **Consequently**, organizational working capital requirements have been reduced.

  Read the sentence again, omitting consequently. The link between property expenses and reduced working capital requirements is not explicit.

- Controlling electrical use starts with knowing where the electricity is being used and then analyzing how to cut costs. **For instance**, lighting accounts for 60 percent of the electric use in a commercial property. In a residence, the number drops to 25 percent, **but** that is still a substantial portion of the electric bill.

  Read the sentence again, omitting for instance and but. The text becomes choppy.

Beginning, Middle and Ending

For business communication to be effective, it must be coherent. It must flow from the beginning, through the middle and come together by the end of the communication. A discussion of these elements follows.

The Beginning

Different ways to write document openings exist. As stated, specific techniques such as executive summaries, abstracts, problem statement and attention-grabbing titles can be used. Regardless of technique, a lead or opening should:

- Introduce the main or central points.
- Set the foundation for the rest of the document.

Asking a question or providing an interesting fact is an effective opening technique. Sometimes, starting at the end of the document is the best way to define what you want people to remember. You can then craft the beginning and middle. Whatever opening technique is used; the beginning should make the reader want to read more of the document.

The Middle

The middle section of the business communication supports and expands on what the beginning promised.

When editing the middle, it is common to find weak points or unnecessary information. There may be excellent points or topics that you did not intend to include. If this happens, be objective and determine what to keep and what to delete. Consider whether the information would be more appropriate in another communication piece. You may need to revise the beginning if you decide the information should be included.

The Ending

This section of the communication is the final place to ensure the communication is coherent. The ideal ending is brief and provides unity with the beginning and middle. Depending upon the type of FM communication you are writing, possible ending techniques include:

- A short, sharp summary.
- A memorable statement or phrase.
- Restatement of a powerful piece of evidence presented.

Readability

A dense page of type with narrow margins is uninviting and challenging to read. Wider margins and white space improve **readability**.

Computer document templates help take the guesswork out of margin width. One-inch margins on the top, bottom, left and right attractively frame content on a page and make the text easier to read and absorb.

White space makes a page appealing. Simple indented blocks of text can set off text with white space and add visual appeal. Indented text works well for long quotations.

Emphasis

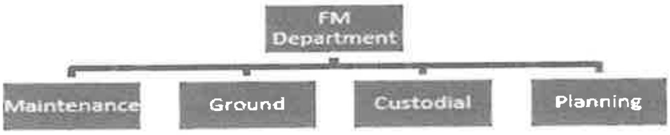
During in-person communication, techniques such as active listening, questioning and nonverbal cues instill **emphasis**. Written communication provides other options to emphasize words, thoughts, ideas, issues and key points. Attractive pages of text with appropriate emphasizers make the page irresistible to a reader.

- Choose techniques carefully based on legibility and appropriateness to support a professional appearance and provide emphasis without distraction.
- Do not overuse the techniques for example, excessive boldface or excessive italics.
- Make sure any text, boxes, charts or graphics done in color read well in black and white for those readers who do not have access to color printers.

Table 27 depicts several techniques to emphasize information in print copy.

Technique Options	Examples
Font choice (typeface and point size)	11 point Times New Roman is used in the body of this text. 20 point Times New Roman is used for chapter titles. 14 point Arial is used for heads. 11 point Arial is used for subheads. 10-point Arial is used in most exhibits.
Bold and *italic* text	**20 point Times New Roman bold** is used for chapter titles. **14 point Arial bold** is used for heads. **11 point Arial bold** is used for subheads. **10 point Arial bold** is used in exhibit titles.
Boxes	Text boxes allow you to set off quotes and key messages and summarize interesting points. Text boxes can be positioned anywhere in the document.
Tables	Using tables in the text can be a more effective way to present certain types of information rather than writing paragraphs of information. Tables break up the monotony of dense text. Gray screens can highlight headers, key words,

<table>
<tr><th>Technique Options</th><th>Examples</th></tr>
<tr><td></td><td>sentences or paragraphs.
Tables also work well to emphasize logical steps.
<table>
<tr><td>Step 1</td><td>Outline content.</td></tr>
<tr><td>Step 2</td><td>Write a draft.</td></tr>
<tr><td>Step 3</td><td>Edit the draft.</td></tr>
</table>
</td></tr>
<tr><td>Graphics</td><td>Numbers, processes and other information lending themselves to a graphic presentation can facilitate understanding and retention and add impact. Graphics are useful for various situations, such as showing the relationship of parts to a whole, comparisons, organization, etc.

</td></tr>
</table>

Table 27 Techniques for Providing Emphasis in Print

Style Principles

Consider the message, whether writing an email or instant message, a memo, letter, report or any type of business document. Writing style is present in all communication activities. One way to achieve the best writing style is to determine the audience you intend to reach, and to write to educate and persuade them. Ultimately, the message reflects on you as the writer and affects how the reader perceives your message.

Many factors shape your business writing style including: the audience, word choice and document structure. Organizational style drives FM communication. This section discusses organizational style, style books, and style guidelines.

Organizational Style Guide

Organizational style standards are essential for communication with the board of directors and senior management. These standards make any communication with other stakeholders look professional.

Follow the organization's conventions on branding and style. Organizations set up rules in a style guide about design of written communication. The style guide indicates how to use the logo or what colors are acceptable in written communication. An organizational style guide might advocate a writing style for example, loose and conversational or formal and rigid. It may include a list of acceptable acronyms.

Many organizations provide standard templates for spreadsheets, written documents and emails. Most have a standard style guide for words to use in written documents.

Some style guides are lengthy, while others are one or two pages long. It is important to understand how the organization's style guide defines the important words and conventions, so they are used the same way every time. More information about style guidelines follows in Tips and Techniques for Writing Style.

Style Books

Many excellent style books can serve as reference for written work. Keep in mind, different style books might have different conventions for the same style principle. When selecting a style book use it consistently. Despite the selection, the organization's style guide takes precedence over any other style book.

Tips and Techniques for Writing Style

Although the organization's style guide takes precedence over any purchased style book of choice, writing style is universal, as applies to:

- Abbreviations
- Acronyms
- Capitalization
- Clichés

- Jargon
- Political Correctness

A discussion of each area follows.

Abbreviations

Although **abbreviations** save time by eliminating the need to write a lengthy title or phrase repeatedly, use them only when the readers will understand them. The following tips help with how to use abbreviations.

- Write out a term the first time you use it and give the abbreviation in parentheses. Then, use either the abbreviation or the term interchangeably.
  - Example: work order system (WOS)
- Use only the abbreviation, if it is so common the audience recognizes it as standard.
  - Example: O&M
- Write the abbreviation first and give the written form in parentheses, if the abbreviated form is more common.
  - Example: SPC (statistical process control)
- Omit apostrophe when writing the plural of an abbreviation.
  - Examples: OEMs, RFPs
- Abbreviate familiar titles preceding or following a person's name.
  - Example of title before name: Dr. Robert Smith
  - Example of title after name: James Bascom, Jr.
- Abbreviate words typically used with times, dates, numerals and units of measurement in charts and graphs.
  - Examples:

    6:00 p.m. or 6:00 P.M. or 6:00 PM
    489 B.C. or A.D. 2020
    6,000 rpm
    271 cm
- Be consistent. If you use p.m. in one sentence, do not switch to P.M. in the next sentence.
- In charts and graphs, abbreviations and symbols are acceptable because they save space for example, = for equals, in. for inches, % for percent, $ with numbers for currency.
- Do not make up your own abbreviations; they will confuse the audience.

- Do not overload copy with abbreviations. They can confuse readers outside the FM department, your organization or the FM profession.
- Do not assume your audience knows the abbreviations in your industry, because abbreviations may have different meanings in other industries.

Acronyms

An **acronym** is formed by combining the first letter or letters of several words. Sometimes, an acronym is pronounceable as if it were a word, such as OSHA (Occupational Safety and Health Administration) or ANSI (American National Standards Institute).

- Acronyms are usually written in all caps without periods. The only exceptions are acronyms accepted as common nouns and written in lowercase letters, such as scuba (self-contained underwater breathing apparatus).
- Form the plural of an acronym by adding a lowercase "s" without an apostrophe for example, FMs.
- Exercise caution when using acronyms, because not everyone understands them. They may mean something different in another language or industry.

Capitalization

The use of capital or uppercase letters is determined by custom. Capital letters call attention to certain words, such as proper nouns and the first word of a sentence. Use capital letters carefully; a spell checker fails to identify the difference. They can affect a word's meaning for example, march vs. March, china vs. China.

Use uppercase letters in the following ways:

- Capitalize proper nouns such as the names of specific people, places, organizations, governmental agencies, divisions and departments or some things.
  - Examples:
    - Australian Property Institute
    - U.S. General Services Administration (GSA)
    - Dinas Tata Kota (Town Planning Authority, India)
    - IFMA's Professional Development Department
    - Golden Gate Bridge
    - Houston, Texas
- Capitalize trade names.
  - Examples:
    - GE (General Electric)

  - Corning
- Capitalize professional and personal titles.
- Titles preceding proper names
  - Examples: Ms. Jones, Senator Smith
- A noun or noun phrase following a proper name is normally not capitalized.
  - Example: Joseph Smith, senator from Connecticut
- The word President is capitalized when it refers to the chief executive of a country.
- Job titles with personal names are capitalized.
  - Example: John Johnson, Facility Manager
- Job titles without personal names are not capitalized.
  - Example: The facility manager is in the office this morning.
- Do not capitalize words to emphasize importance.

Write this ...	... Not this
The FM department goal is to provide value and quality.	The FM department goal is to provide Value and Quality.
Turn off the lights when you are the last one out the door.	Turn Off the Lights when you are the last one out the door.

Clichés

A **cliché** is an overworked expression or a worn-out word. Clichés distract the reader and detract from the writer's credibility. Often, clichés are wordy, vague and confusing, especially to speakers of English as a second language. Unless the reader is fluent in the language in which the communication is written, it is best not to use clichés.

Clichés may come to mind as you draft your communication, eliminate them during revision. Table 28 provides a better word or phrase for each of the following familiar clichés.

Instead of...	Use...
All over the map	Scattered

	Unfocused
The game plan	Strategy Schedule
Last but not least	Last Finally
Thinking outside the box	To think differently To think unconventionally To think from a new perspective
Low-hanging fruit	Easy option Easy to solve problem
Turnkey solution	Easy to implement system

Table 28 Substitutes for Clichés

Jargon

Jargon is a collection of words or expressions used by a profession, a trade or group. As with any profession, jargon is inherent in facility management.

If your entire audience is part of facility management, jargon provides an efficient means of communicating. If you are unsure whether any part of the audience understands FM jargon, then minimize or avoid using the associated vocabulary. Otherwise, the jargon becomes an issue in communication for an audience unfamiliar with the specialized vocabulary.

Political Correctness

The purpose in most FM communication is to get a favorable response from the audience. **Political correctness** may form a barrier to communication. It is being sensitive to the feelings of readers. Certain words can stereotype, intimidate or insult individuals. Being sensitive to how words might offend others is important in a diverse workplace. The following tips help you with being politically correct in FM communication:

- Avoid offending your readers with politically incorrect language.
- Be considerate of your audience's feelings.
- Be careful with the words you choose.

Words one audience construes as offensive may be fine with another group and vice versa. It is beyond the scope of this discussion to provide a checklist of terms of which you should be wary.

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Lesson 2: Increasing the Ability to Influence, Persuade and Negotiate

This lesson focuses on these subjects:

- Influence
- Persuasion
- Negotiation

Introduction

This lesson examines how developing your influencing, persuading and negotiating skills enhance your ability to communicate effectively with FM stakeholders.

As a facility manager, you work with numerous stakeholders to achieve organizational goals. Consensus about the following questions must be obtained before moving toward achieving these goals:

- What are the goals?
- How will the goals be achieved?
- What will happen if difficulties block achieving the goals?

It is beneficial to define who a stakeholder is before discussing the topic of **influence**, **persuasion** and **negotiate**. Stakeholders include organizations, groups and other entities affecting or being affected by an organization's objectives and actions. Many types of stakeholders exist, depending on the industry and organization. In facility management, stakeholders include the following:

- Board of directors
- Upper management
- Department heads
- Facility staff
- Peers
- Facility occupants
- Contractors
- Vendors and suppliers
- Government officials
- Community leaders

- The public

The stakeholder perspective recognizes these relationships are dynamic. The perspective can be negotiated or influenced, but not be viewed as being in a fixed state. The stakeholder perspective states an organization is more effective when it understands, manages and satisfies stakeholder needs and expectations. Meeting stakeholder interests is challenging because they tend to conflict with organizations lacking enough resources to satisfy everyone. It becomes a task to decide how much priority to give each group.

Several factors influence prioritization of stakeholders, including a stakeholder group's power and urgency for action; its legitimate claim to organizational resources; the organization's culture; and the values of the board of directors, senior management and the facility manager. Each stakeholder has different values and priorities to be addressed.

Example of Various Stakeholder Views of a Goal:

You are asked to replace a chiller in the facility. Your task is to determine how various stakeholder groups view this project (their values and priorities), so you know how to approach them in communication.

- Senior management priorities are fiscal, monetary and bottom-line efficiency reported from the facility manager.
- Facility management priorities are technical and operational issues related to air quality.
- Occupant interests are responsiveness, basic comfort and productivity by facility management.

The Importance of Influence, Persuasion and Negotiation

Chances are you draw on **influence**, **persuasion** and **negotiation** skills daily. You have opportunities to impact decisions and advance the facility management function. Positive outcomes are readily attainable through effective negotiation and use of influence and persuasion.

The applications for influence, persuasion and negotiation are numerous in facility management. For instance:

- You need to present a business case for a capital expenditure.
- You want to convince a supplier to expedite shipment of parts.
- You need to lobby with occupants about energy efficiency.

The differing values and priorities discussed earlier in this section may require you to influence, negotiate and persuade stakeholders to reach an agreement acceptable to all parties involved. Discussion of these concepts follows.

Influence

Influence is any action attempting to alter someone's attitude or behavior. It is a subtle mechanism through which people coordinate their efforts and act together to achieve organizational objectives.

Influence should not be confused with power. While the direct application of power has a place for example, in controlling resources, settling disputes, making assignments or communicating during a crisis, influence gets results without direct command, pressure or coercion. When you exercise influence, you essentially encourage people to do what you want them to do, but you get them to do it through their own choice.

Types of Influence Tactics

Although no definitive list of influence tactics exists, tactics are generally divided into hard influence tactics and soft influence tactics.

The hard tactics force behavioral change through position power for example, legitimate, reward and coercion.

Soft tactics rely more on personal sources of power and appeal to the target audience's attitudes and needs. Discussion of persuasion and negotiation as soft influence tactics occurs later in this lesson.

Tips and Techniques for Influencing FM Stakeholders

These tips and techniques are ways to help facilitate personal influence as you build relationships, trust and respect with stakeholder groups.

- Realize influence is two-way. If you are not open to influence from others, you are attempting to apply personal power to get what you want. Openness to influence from superiors, colleagues, external service providers, customers, FM staff and others demonstrates trust and respect, and helps you acquire knowledge.
- Practice good communication skills. Be an active listener. Active listening helps you understand what others have to say. It also signals you are open to hearing their

perspective. Use open-ended questions to invite others to more fully express their ideas and opinions. See Active Listening in Chapter 1 for additional techniques.

- Work to expand your sphere of influence. Sphere of influence refers to the area in which a person can effectively exert influence. What is your organizational sphere of influence as a facility manager? Most likely, it is strongest within the sphere of your formal authority. But if you want to be influential, step outside your comfort zone. This translates to finding ways to strengthen your influence in the entire organization's strategic decisions and issues.
- Use information as a lever of influence. As a facility manager, you have exceptional technical expertise on which many critical organizational decision makers depend. Be audience-focused in your communication and share compelling and irrefutable information to those individuals.

Persuasion

Persuasion is a process involving the use of facts, logical arguments and emotional appeals to change another person's beliefs, opinions and attitudes, usually for the purpose of changing the person's behavior. Persuasion might occur in a single conversation or through a series of planned or tiered communications.

The effectiveness of persuasion as an influence tactic depends on the characteristics of the persuader, message content, the communication channel and the characteristics of the audience being persuaded.

- Persuader Characteristics
  - People are more persuasive when the audience believes they have expertise and credibility. As a result, the audience is more likely to consider the persuader trustworthy, believable and sincere. Credibility is higher when the persuader:
    - Does not seem to profit from the persuasion attempt.
    - Mentions limitations with the position being persuaded.
    - Acknowledges minor positive features of the alternative choices.

    These attributes reinforce your appeal and increase the likelihood others accept your ideas.
- Message Content
  - The message is more important than the messenger/persuader when the issues are important to the audience. Message content is more persuasive when it acknowledges several points of view. As a result, the messenger is viewed as more credible and the audience does not feel pressured by the persuasion attempt. Limit the message to a few strong arguments you repeat

a few times but not too frequently. Use emotional appeals, such as a graphic showing the consequences of a bad decision. Only do this in combination with logical arguments and specific recommendations to overcome the threat.

Some people find ways to resist the persuasion attempt, even if their explanations for resistance are implausible. You increase your chances at persuasion if what you say does the following:

- It is logical and supported by facts and expertise.
- It addresses stakeholder interests.
- It eliminates or minimizes objections or competing alternatives.
- It recognizes and deals with any organizational politics.

- Communication Channel
  - Generally, persuasion works best in face-to-face conversation, whether in-person or virtual, and through other media-rich communication channels. The personal nature of face-to-face communication increases the persuader's credibility. The richness of this channel provides faster feedback on whether the influence strategy is working.
- Audience Characteristics
  - Credibility does not matter unless you know your audience and their receptivity to what you have to say. You must understand the people you hope to persuade and learn how they make decisions. Try to identify how different people in a stakeholder group are aligned. In this way, you enhance your ability to persuade the group.

Negotiation

Negotiation occurs whenever two or more conflicting parties attempt to resolve their divergent goals by redefining the terms of their interdependence. People negotiate when they think discussion can produce a more satisfactory arrangement in the exchange of goods or services. Although everyone negotiates, it is evident in the workplace because employees work interdependently with each other. They negotiate with their managers, with facility occupants and with coworkers. The Leadership and Strategy competency discusses specific negotiation techniques.

The purpose of discussing negotiation in this section is to examine the communication aspects of negotiation as it applies to normal FM operations. Possible negotiations related to facility management include, but are not limited to:

- Establishing service specifications for a contractor.
- Defining desired outcomes for a landscaping project.

- Identifying personal development goals for FM staff.

The potential participants in FM negotiations depend on what is being negotiated. The principals might include the board of directors, senior management, facility occupants, service providers, contractors and others.

Communication difficulty arises because the negotiating parties approach the task as if their side is the only side.

Tips and Techniques for FM Negotiation

- The ideal environment for negotiation is one conducive to open discussion. Both parties should be able to see each other. A face-to-face meeting, whether in-person or virtual, is best.
- How the discussion is structured is important. Rather than making presentations to each other, the parties should talk with each other. Active listening should be practiced so each party can develop an understanding of the other's viewpoint.
- Clarifying expectations is a key consideration in negotiation. Each party typically comes to the negotiation discussion having a preconception about the desired outcome. Being able to look at the negotiation from a broader perspective may result in the realization multiple ways to achieve the same overall objective exist.

Lesson 3: Preventing Plagiarism and Copyright Infringement

This lesson focuses on these subjects:

- Plagiarism
- Copyright Infringement

Plagiarism

Plagiarism is a form of dishonesty involving the use of another person's ideas, words, as one's own in whole or in part without acknowledging the author or obtaining the author's permission. Plagiarism is not just restricted to written text, but is applicable to other works such as ideas, design, art and music.

Types of Plagiarism

A person can plagiarize in several ways. Some of the ways plagiarism might be committed are:

- Direct plagiarism
  - Copying another writer's work directly with no attempt to acknowledge the source of the work.
- Direct "patchwork" plagiarism
  - Copying and rearranging material from several writers with no attempt to acknowledge the original sources.
- Paraphrasing or summarizing without giving credit
  - Changing the words of an original source but using the ideas in it without acknowledging those ideas are not your original thought, even if you add your own spin to the original.
- Plagiarism of graphs, figures or images
  - Using graphs, charts, figures or images from a source without acknowledging another person developed them.
- Misinterpretation of material as "common knowledge"
  - Failing to provide the source for material because you believe it is "common knowledge," when it is not.

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The best way to prevent committing plagiarism is to give credit in your communication to the author of any material you use from a source, whether you quote directly, or summarize or paraphrase the material.

Copyright Infringement

Copyright is a form of protection provided by the laws of the United States to authors who independently created a work such as a book, movie, picture, song or website content. It refers to the legal right of the creator to indicate how other people use the creator's work. It helps protect the creators from other people copying their work without permission or copying the work for commercial purposes.

There is no such thing as an "international copyright" to automatically protect an author's works throughout the entire world. Protection against unauthorized use in a country depends on the laws of country where protection is sought. Most countries offer protection to non-U.S. works under certain conditions, and these conditions have been greatly simplified by international copyright treaties and conventions. Generally, a U.S. work may be protected in another country if that country has entered into an international agreement with the United States.

In most countries, authors automatically own the copyright to any work they make or create, if they do not give the copyright to someone else. In most countries, there is no need to register the copyright, and some countries do not even have procedures to register copyrights. But, where registration is available, many authors register anyway, especially for works that are sold for money. That is because registration helps to prove that the copyright of a work belongs to a certain author.

If you are unsure whether a work you want to use is protected by copyright, check the laws of the country where you are located.

Lesson 4: Selecting and Evaluating Reliable Sources of Information

This lesson focuses on these subjects:

- Selecting and evaluating reliable sources of information

Introduction

This topic provides guidelines for researching credible sources.

At times, you may need to find credible sources to help support the topic of your communication. How do you evaluate their relevance and reliability before you select and use them?

Articles written by facility managers and service providers and published in the IFMA magazine might be good sources of information for your topic. It is beneficial to confirm the content in an article you select from the magazine is relevant and reliable for your topic.

Relevance

A **relevant source** includes data you can use as evidence, discussions of what you plan to present in your communication, or arguments to show you how others perceive your question. Skim the key parts of the text for terms related to your question or for answers to your question. This includes the introduction or conclusion, headings or subheadings, and the first one to two paragraphs after each heading or subheading.

Reliability

The evidence you include in your communication from a source is not persuasive if it comes from one your readers do not trust. To determine the **reliability** of a source, ask the following six questions.

- Who is the author?
    - Look at the author's qualifications. What else has the author published? Is the author referred to in other sources? This suggests influence in the field. You may need to do more research to learn more about the author.

- What does the author's list of references look like?
  - Authors of reliable sources will include a properly formatted, thorough list of references. How reliable are those sources?
- When was the source created?
  - More recent sources are generally more reliable. This is particularly true in rapidly evolving fields. However, in other fields, the oldest sources might be more authoritative. Before using them, consider whether it would be risky to use older information.
- Where did you find the source?
  - Does the source appear in a medium with an academic feel, such as an online journal database or a college library? Does the source appear in a medium with a non-academic feel, such as Facebook or a website with a lot of advertisements?
- Why was the source created?
  - Make sure the author's purpose aligns with your purpose. Is the purpose to report about fact-based information? Is the author trying to persuade the reader to agree with the author's premise? Is the purpose only to entertain the reader?
- How is the source relevant to your topic?
  - Only choose sources you can use. Readers can tell if you try to force an irrelevant source to fit into your communication.

Common Sources

Table 29 provides a list of common sources writers use, including how reliable the sources tend to be.

Source	Level of Reliability	Explanation
Peer-reviewed journal articles	Reliable	These articles are written, reviewed and published by scholars in the field, so you know their information is accurate (unless it is outdated).
Almanacs	Reliable	If the almanacs are not outdated, you can rely on them to contain accurate information. Keep in

Source	Level of Reliability	Explanation
		mind, they are usually only useful for gathering information; they will probably not feature argumentation.
Newspaper articles	Reliable	Newspapers are good for supplying you with background information on your topic. Like almanacs, newspaper articles are supposed to be written objectively and will probably not contain argumentation. The "editorial" section of the newspaper may contain useful argumentation, but make sure the author is qualified.
Books	Sometimes reliable	Not all books are reliable for your purpose. Check the book against your six questions.
Websites	Sometimes reliable	Check the source against your six questions. In addition, you can usually determine a website's reliability by investigating: whether there is an "about us" page to describe the author's or authors' qualifications and experiences the organization of the website is. Reliable websites tend to be organized better the number of advertisements the website has. Websites are often run for a commercial rather than for an informative purpose and depend on ad revenue .gov websites can be good

Source	Level of Reliability	Explanation
		sources for finding empirical data such as census results, voter turnout, among others.
Interviews	Sometimes reliable	The Who question is especially important here. You want to be sure the person you are interviewing is a reliable authority on your topic. Would you trust this person to give you accurate information?
Magazine articles	Unreliable	Most magazine articles are written to entertain. They are unlikely to align with the purpose of your research. If a magazine article cites another source, you may wish to investigate the other source.
Online encyclopedias	Unreliable	These can be helpful for getting a basic overview of your topic before you begin your research. Articles in online encyclopedias can be edited by anyone, you should never use them as sources. Instead, scroll down to the "References" section at the bottom of the article and consider using some of those sources instead.

Source	Level of Reliability	Explanation
Articles authored by freelance writers	Unreliable	Freelance writers get paid by the quantity of their work, not by the quality. It is likely they have little incentive to produce factual, accurate information. If the author claims to have impressive credentials, it is better to use journal articles, which are reliable.

Table 29 Common Sources

What Would You Do in This Situation?

You are presenting a business case for a capital expenditure to the facility's board of directors. What influence tactics might you use to get the approval you desire? How would you communicate these tactics to achieve a positive outcome?

Chapter Summary

Congratulations! You completed Chapter 2 of IFMA's Communications Course.

This chapter focused on the fundamentals of good business writing. The learning objectives were to:

- Explain writing principles supporting good business writing.
- Discuss how business writing skills improve influence, persuasions and negotiation with stakeholders.
- Prevent plagiarism and copyright infringement of any kind.
- Find reliable and credible sources of information.

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Chapter 2: Progress Check

1. Content, and organization and format are two business writing principles. What is the third principle?
   a. Emphasis.
   b. Style.
   c. Readability.
   d. Influence.

2. You are writing to FM stakeholders to persuade them to act on a situation. What is important to consider when writing to them? Select all answers that apply.
   a. Assume the reader knows everything about the topic.
   b. Make intended points quickly and succinctly.
   c. Minimize risk for the reader's resistance to change.
   d. Require minimum reading time on the reader's part.

3. Hard influence tactics force behavioral change through ___________
   a. position power.
   b. personal sources of power.
   c. appealing to the target audience's attitudes.
   d. appealing to the target audience's needs.

4. Persuasion attempts to call attention to the receiver's attitudes, beliefs, or actions.
   a. True
   b. False

5. The most effective persuasive message connects closely to the receiver's desires and interests.
   a. True
   b. False

6. Persuasion strategies work the same in all cultures.
   a. True
   b. False

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7. Communication is difficult when negotiating parties believe their side is the only side.

    a. True
    b. False

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Chapter 3: Written Business Communication to Achieve Results

Lessons

- Objectives
- Lesson 1: Fundamentals of Correspondence
- Lesson 2: Writing Emails
- Lesson 3: Writing Instant Messages and Text Messages
- Lesson 4: Writing Memos
- Lesson 5: Writing Business Letters
- Lesson 6: Writing Business Plans
- Lesson 7: Writing Business Reports

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Objectives

Chapter 3: Objectives

On completion of this chapter, you will be able to:

- Understand the basics of correspondence.
- Describe the elements necessary for creating effective written communication.
- Understand how to effectively use written communication with a call to action to encourage an intended result.
- Describe the writing elements needed to create a business report.
- Describe the writing elements needed to create a business plan.

This chapter focuses on helping get the message out through effective written communication.

As a broad concept, business communication relates to sharing of information in a business for the purpose of benefitting the organization. It conveys business developments, expectations and legalities to employees and other stakeholders. Business communication is an important means of getting the message out, it is important to understand how it impacts your ability to express to stakeholders what they should know.

Written business communication is either internal or external. Internal written communication involves messages transmitted within an organization between departments, managers and employees. External written communication involves messages shared between a company and its clients, independent contractors and other stakeholders not working for the company.

Written business communication entails digital or non-digital media to help an individual convey information to an audience. Non-digital media includes traditional forms of communication such as letters, memos and reports. Digital media includes email, cloud documents and messaging app transmission. Digital media is more popular due to the shift to global business and its ability to transmit information quickly to stakeholders throughout the world.

Lesson 1: Fundamentals of Correspondence

Before discussing the various forms of written communication, it is beneficial to put them into perspective by providing foundational content on the concept of correspondence.

Correspondence in the workplace requires researching, organizing, writing and revising content to ensure the communication conveys what the reader should know. It requires selecting the best medium to send the material to the intended audience.

Correspondence requires focus on establishing or maintaining a positive working relationship with the readers. Correspondence helps convey a professional image of the organization and you. These concepts are discussed in detail throughout the course. Some of the content presented in this lesson is discussed in more detail in the chapter's other lessons.

Audience and Writing Style

Effective correspondence uses appropriate **conversational style**. Whether you use formal or informal writing style depends on the reader and on the purpose for writing. For example, a formal style is used with someone you do not know or do not know well, or with someone of higher rank. An informal style can be used with a colleague you know well. An impersonal and unfriendly message to a facility occupant can tarnish the image of the organization and the facility manager. A thoughtful and sincere message can enhance the image.

A formal writing style is used more frequently than an informal style. An overdone attempt to appear casual or friendly can come across as insincere. Writing reads like a legal contract if it is in a very formal style, not only does this pretense irritate and confuse the reader, it also wastes time and produces costly errors.

Establishing Goodwill

Goodwill in business refers to the established reputation of a company as a quantifiable asset and calculated as part of its total value. It is a vague though vital component for increasing a company's customer base and for retaining existing clients.

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Most organizations maintain significant goodwill with their most important stakeholders – customers and employees. How you communicate with a facility occupant provides an excellent opportunity to build goodwill and confidence in your organization and in the FM function. For instance, no matter the tone of the initial communication from a facility occupant, the response should be positive and respectful to promote goodwill. Focus the response on what is being done to correct the issue to instill confidence in the FM department. Additional examples demonstrating how to establish goodwill follow.

Write concisely, but do not be blunt, this risks losing the reader's goodwill. Responding to a vague written request with a phrase like "Your request was unclear" or "I don't understand" might offend the reader. Instead, write something like the following example to establish goodwill as you ask the reader to provide the information you need:

Example:

- I am glad to help, but I need additional information to locate the report you requested. Can you give me the report's title and release date?

Although this version is longer, it is more tactful and encourages a helpful response from the reader.

Another way to build goodwill is to emphasize the reader's needs. For instance, suppose a facility occupant complains by voicemail about something being broken without leaving details. In response, one of the following examples can be used:

Example:

- We must create a work order before we can fix the issue. Your needs are emphasized with "We must".

Consider writing your request this way:

Example:

- Please contact our office so we can get the details and create a work order. It still focuses on your needs and is polite and promotes goodwill, "so we can process."

You can put the reader's needs and interests first by writing from the reader's perspective. To accomplish this, use the words "you" and "your" instead of "we, our, I, mine." Consider the following revision of the previous examples:

Example:

- Please contact our office to create your work order quickly. You emphasize the reader's needs with "your."

This revision stresses the reader's benefit and interest. By taking this approach, you are more likely to get the reader to act faster.

Goodwill and the use of "you" can produce insincere writing if overdone. The reader may ignore or resent messages full of excessive praise and inflated language.

Tips for Achieving Goodwill

Keep the following tips in mind to achieve goodwill:

- Be respectful, not demanding.
- Be modest, not arrogant.
- Be polite, not sarcastic.
- Be positive and tactful, not negative and condescending.

Presenting Good and Bad News

In general, it is more effective to present good news directly to the recipient and to deliver bad news indirectly to the recipient. This is especially true if the stakes of receiving the news are high.

Presenting Bad News

Readers form their impressions and attitudes early, which may lead you to lessen the impact of bad news by attaching it to reasons that put it into perspective.

If you write international correspondence, far more cultures write messages indirectly than directly. See International Correspondence later in this lesson for additional discussion.

A general sequence for delivering bad news in correspondence is:

1. An opening to provide context, referred to as a buffer.
2. An explanation.
3. The bad news.
4. A goodwill closing.

The opening introduces the subject and establishes a professional tone. The body (numbers 2 and 3 in the sequence) provides an explanation by reviewing facts to put the bad news into perspective. This promotes understanding, and produces goodwill. The closing reinforces a positive relationship through goodwill or helpful information.

Presenting Good News

It is easier to deliver good news. By presenting the good news in your opening, you achieve goodwill from the beginning. You increase the likelihood the reader pays careful attention to the rest of the correspondence.

The sequence for delivering good news in correspondence is:

1. Good news opening.
2. Explanation of the facts.
3. Goodwill closing.

Openings and Closings

The opening of any correspondence generally identifies the subject and the main point of the communication, and it reminds the reader of the context. When the reader is unfamiliar with the subject or with the background of the problem, provide an introductory paragraph before stating the main point of the correspondence. This is important in correspondence created to serve as a record of crucial information. In general, longer or complex subjects benefit from more thorough introductions.

Do not state the main point first when readers are likely to be skeptical, or when key readers like your manager or facility occupants may disagree with your position. A more persuasive approach is to state the problem or issue first. Next, present specific points to support your recommendation.

Use your closing to do the following:

- Build positive relationships with the readers.
- Encourage colleagues and employees.
- Indicate what you plan to do or what you expect the readers to do.

Clarity and Emphasis

A clear message emphasizes your main points. The following example shows how adequate development is crucial to the clarity of your communication.

Example

Vague message	Be more careful on the loading dock.

Developed message	To prevent accidents on the loading dock, follow these procedures. 1. Check (followed by specific details) ... 2. Load only ... 3. Replace ...

Although the vague version is concise, it is not as clear and specific as the developed version. Do not assume the reader knows what you mean. It is easy to misinterpret vague messages.

Lists and headings help create clear messages. See Chapter 2 for additional discussion on using lists and headings.

Capitalize all major words in a subject line, except articles, prepositions and conjunctions, unless they are the first and last words. The subject line does not substitute for an opening and does not provide context for the message. Find further discussion on using subject lines throughout this chapter.

International Correspondence

The features and communication styles of specific national cultures are complex. Such cultural differences are based on perceptions of time, face-saving and traditions. For instance, in the United States, direct and concise correspondence demonstrates courtesy by not wasting the reader's time. Such directness and brevity in other countries may seem rude, suggesting the writer is dismissive or lacking in manners.

A writer in the United States might consider one brief letter or email enough to communicate a request. A writer in another country may expect multiple exchanges to prepare for action.

When you read correspondence from people in other countries or cultures, pay attention to differences, such as customary expressions, openings and closings. For instance, Japanese business writers traditionally use indirect openings reflecting on the season, complimenting the reader's success, or offering hope for the reader's continued prosperity.

Consider deeper issues, such as how writers from other cultures express bad news. Some cultures express negative news indirectly to avoid embarrassing the recipient.

When writing for international readers, rethink any longstanding habits defining how to express yourself. Learn as much as possible about the cultural expectations of others. Focus on politeness strategies to demonstrate respect for readers. This helps achieve clarity and mutual understanding.

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Lesson 2: Writing Emails

This lesson focuses on these subjects:

- Email limitations
- Email etiquette
- Email permanence
- Inbox organization
- When to stop sending email

Introduction

This topic provides guidelines for writing professional and effective email messages to FM stakeholders.

Electronic mail, or **email**, functions as a global means of exchanging information and sharing electronic files with employees, managers, clients and other stakeholders.

As a communication tool, email is a quick and easy way to communicate. Email messages may be informal notes, be aware that they function as business letters and memos. Convey a professional image on behalf of the organization by not sending the first draft of your message. As with any communication, ensure that the email includes all crucial details. Verify the message is free of grammatical or factual errors, ambiguities, and unintended implications.

Keep in mind email messages can be forwarded easily. Deleted messages can remain on company servers indefinitely because most organizations back up and store email. They can legally monitor their employees' email use. Depending on circumstances, email can pose organizational liability risks. It can be used to substantiate or negate a lawsuit. Companies can be required to provide email and instant messaging logs in a court of law. Consider the content of your messages carefully and review your text before clicking "Send."

Recipients of business emails expect and deserve professional communication. Be careful when sending messages to managers in your organization or to people outside your organization. As stated, spend extra time reviewing your email before clicking "Send." This can save any embarrassment of misunderstandings caused by a carelessly written message. Applying sound writing principles and observing email etiquette ensure that business emails get read and achieve the results intended. Additional discussion on email etiquette follows later in this lesson.

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Email Limitations

This section discusses some email limitations and includes tips on what organizations can do to reduce or eliminate these issues. These limitations are:

- Misinterpreting the message.
- Communicating negative messages.
- Conveying emotions.
- Considering privacy concerns.

Misinterpreting the Message

The potential to misinterpret a message in an email is greater than misinterpreting it when delivered verbally. Most people believe they send and interpret clear messages, research from New York University indicates people decode an email's intent and tone correctly only 50 percent of the time.

Make sure to reread your email for clarity before sending it.

Consider you might be misinterpreting a message if the presumed tone of a message from someone else upsets you.

Communicating Negative Messages

If you have negative information to communicate to stakeholders, email might not be the best method. The effect could be the opposite of what you intended.

Conveying Emotions

Some people view emails as a faceless, unemotional form of communication. Emails are often very emotional. For instance, senders might write things they would never be comfortable saying to the receiver in person. This is because no face is there to see the reaction.

A common way of communicating emotions in emails is with emoticons. Note they are too informal for business.

When an individual sends an inflammatory message, remain calm and do not respond in kind. When you initiate the email, lessen any tendencies to send off a message quickly.

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Considering Privacy Concerns

Privacy issues exist with email. For instance, many companies use software to monitor email activity. You cannot assume the recipient of your message will keep it confidential. Refrain from writing anything you would not want made public.

Similarly, exercise caution in forwarding email from the company email account to personal or public email accounts, for example, Gmail or Yahoo. These accounts may not be as secure as a corporate account. You could be violating your organization's email policy, or unintentionally be disclosing confidential data.

Email Etiquette

Several email etiquette guidelines exist. Below lists important email etiquette which applies in most organizations. Tips and techniques are provided to support professionalism and to promote efficiency and to provide protection.

- Email Etiquette
  - Reply to emails within the same working day or within 24 hours. If you cannot answer a request immediately, let the other party know when you will respond. Also, let the other party know if you cannot respond to the item.
- Write a precise subject line.
  - A subject line should indicate what the message is about and should allow the recipient to understand the contents before reading the message. Not including a subject line could result in the email being sent to a junk mail folder or being intercepted by organizational protection software as possible spam.
- Create a useful, simple signature.
  - For business emails, recipients typically need your full name, title, organization name, mail address, email address, Web site and business phone and facsimile numbers. Mobile phone numbers may also be appropriate to include. Be judicious with graphic tag attachments.
- Do not overuse the high priority option.
  - Overuse desensitizes the audience.
- Use To, Cc and Bcc properly.
  - To: For those who need to respond to the request in your message.
  - Cc: For those who need only to be aware of what is happening.
  - Bcc: To keep the recipient and the recipient's email address confidential.

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- Do not use ALL CAPITALS (uppercase).
    - All uppercase tends to convey anger or is equated with yelling; it can be annoying and may trigger an unwanted response in the form of a flame which is an angry or overly sarcastic or critical mail.
- Be concise and to the point.
    - Readers appreciate brevity and do not want to spend time on unrelated information. In those cultures where the sender writes messages indirectly rather than directly, brevity and directness may appear rude to the reader. This may suggest to the reader the sender is being dismissive or is lacking in manners.
- Do not attach unnecessary files.
    - Large attachments can bring down an email system, so send only productive files checked for viruses.
- Prioritize important files.
    - Attach files in order of importance. To clarify their order, consider including a numbered list of the attachments in the body of the email.
- Be careful when forwarding message threads (chains).
    - Do not omit a message thread if it contains required or relevant information. Ensure you do not inadvertently forward a thread containing confidential information embedded somewhere within the body text to unauthorized recipients.
    - Revise the subject line to reflect the current content based on your purpose and context.
- Use spell-check and proofread the email before you hit Send.
    - Wrong spelling, grammar and punctuation can lead to potential misunderstanding and frustration. It can create a bad impression of you and your organization.
- Use "Reply to All" judiciously and only if shared communication is essential.
    - Message sent to five people should result in five responses. If every recipient clicks "Reply to All," each person receives multiple responses!
- Be careful with formatting (HTML tags, rich text formats and bold and italic text)
    - Some recipients may be able to receive only a plain text email.

Additional Email Etiquette Tips

- Review your organization's policy on the appropriate use of email. If no explicit policy exists, exercise professional judgment and discretion. Lead by example with the FM staff and colleagues.
- Review whether the organization allows use of business email for personal reasons.
- Maintain a high level of professionalism when using email.
    - Do not forward jokes or spam, discuss office gossip or use biased language.
    - Do not send emails containing abusive, obscene or derogatory language to attack someone.
    - Do not use clever or hobby related email usernames, if you have permission to create your own. Companies generally have a process in place to create usernames based on some form of an employee's name.
- Include a cover message for all email with attachments.
- Send a courtesy response informing the email originator you need additional time to reply to a request.
- Sign the email or use a signature block to avoid possible confusion about who sent or responded to a message. Additional discussion about signature blocks follows later in this section.

Sensitive and Confidential Information

Organizations attach disclaimers, either pre-pended or appended, to email transmissions. A disclaimer warns that the content of an email is confidential and intended only for the use of the recipient. It may indicate the information has been scanned by virus-checking software.

Disclaimers can decrease organizational liability. The organization is ultimately responsible for the actions of its employees, including the content of any email they send. Confidential or sensitive information is tricky, because it can be easily taken or lifted by others. In some countries, disclaimers do not serve as deterrents.

If you use email to communicate sensitive or confidential information internally or externally, that information may be shared deliberately or inadvertently with others. Make sure you know whether your organization restricts classes of information transmitted by email.

Formality

Make sure an email cannot embarrass you or the organization. Email may lack some of the formality of printed communication with the organization's logo, it can be legally binding. If you would not put the content of a message in print or send it as a memo or letter, do not send it as an email.

Keep rumors, gossip and other nonbusiness related information out of an email.

Avoid humor in work-related email. Although there is a place for humor in the workplace, email is not the place. If an internal recipient is offended by an email's content or its attachments, it may be considered as workplace harassment. Misguided attempts at humor in an external email can undermine your credibility and damage your organization's reputation.

Tone

The recipient of email cannot see a face, body language or hear the tone of voice. Choose words carefully and thoughtfully. Assess the audience. Be empathetic and consider how certain words may come across in cyberspace.

Emotions

Refrain from using emotional words, profanity, or abusive/offensive language in business emails. Anything written can produce a difficult position, reflect poorly on the organization, or be evidence in a lawsuit.

Many successful professionals hold draft emails for a short cooling-off period when the subject agitates them. This allows them to respond to an issue calmly and avoid unnecessary problems or conflict.

Salutations, Closings and Signature Blocks

An email can function as a letter, a memo or a personal note. Adapt the salutation/greeting and closing/sign-off to the audience and the correspondence.

- Formal Salutation and Closing

  When your email is a traditional business letter, use the standard salutation followed by a colon. Salutation examples include:

  - Dear Mr. (Surname):

- Dear Mrs. (Surname; only if you know that this is a married woman with her husband's surname):
- Dear Ms. (Surname, married or not):
- Dear Sir/Madam:
- When closing, consider whether it should be formal or whether you can type your complete name above your signature at the end of the correspondence. Depending on formality, one of the following closings may be appropriate:

Sincerely	Best regards
Yours sincerely	Best wishes
Yours faithfully	Regards

Table 30 Closings

- Personal Greeting Salutation and Closing
  - When sending an email to individuals or small groups in your organization, you may want to adopt a more personal greeting, followed by a comma.
  - Depending on formality, one of the following greetings may be appropriate:

Dear (first name)	Team
Hi	Greetings
All	

Table 31 Greetings

  - When an email is a personal note to a friend or close colleague, use a personal greeting or only a first name and an informal closing. Examples of informal closings are:
    - Take care,
    - Best,
  - NOTE: In some countries, business correspondents do not use first names as freely as American correspondents do.
- Signature Block

  Many organizations require signature blocks at the bottom of emails. The signature block supplies information usually contained in the company letterhead, along with appropriate links to websites. If the organization requires a certain format, adhere to that standard. Otherwise, consider the following guidelines:
  - Keep line length to 60 characters or fewer to avoid unpredictable line wraps.
  - Test the signature block in plain text to verify any information.

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- Use highlighting cues, such as hyphens, equal signs and white space to separate the signature from the message.
- Avoid using quotations, aphorisms, proverbs or other sayings from popular culture, religion or poetry in professional signatures.

Email Permanence

Email functions with immediacy, is readily available and has ease of use. It also has permanence. Email management software and email response tools monitor implementation of organizational rules. When deleting email from your mailbox, it is only eliminated from displaying. It is never truly gone. It resides on the organization's mail server and is retrievable anytime.

Inbox Organization

The practices of flagging and sorting incoming emails into folders are helpful in keeping track of communication about projects and tasks.

Flagging enables marking emails for follow-up based on importance.

Sorting emails in folders is a valuable way to organize messages pertaining to specific projects and tasks. Folders are managed either automatically or manually. By setting up a rule, you can specify that certain emails go to certain folders. Alternately, this can be done manually by moving the emails into the folders.

When to Stop Sending Email

At times, circumstances warrant not corresponding by email. Email is not a real time conversation. It is unrealistic to expect an instant response, not everyone is available to do so immediately. If the communication is critically important, do not rely on email.

Without inflections and intonations, it is hard to convey the feeling behind words. Consider handling the situation by phone or in person, either face-to-face or virtually when trying to resolve a conflict, communicate an important business decision or discuss a delicate or complex issue.

Consider a phone call in lieu of another email response when emails go back and forth more than three times without producing clarity, or when they create greater intensity and misunderstanding

Lesson 3: Writing Instant Messages and Text Messages

This lesson focuses on the following subject:

- Creating effective instant messages and text messages

Introduction

This topic provides guidelines for writing professional and effective instant messages and text messages to FM stakeholders.

Instant messaging (IM) and **text messaging (SMS)** represent fast and inexpensive means to stay in touch with your staff, and for staff to stay in contact with each other and with facility occupants. The terms instant messaging and text messaging are used interchangeably, they are two forms of communication. Discussion for each communication medium follows in this lesson.

Some IM and SMS users find the continual presence of messaging intrusive and distracting, making it hard for employees to focus and concentrate on their work.

Neither instant messaging nor text messaging can replace email completely. Email is a better means for conveying long messages needing to be saved. IM is preferable for very short messages of one to two lines, which would clutter up an email inbox.

Instant Messaging Privacy and Security

Instant messaging sent by computer, is a text-based communication medium which fills a niche between the phone and email.

An IM system enable the identification of people online and exchanges messages with them in real time. It is more spontaneous than email. IM lets you surf the Internet with the other person while having real-time conversation. An IM system alerts you when someone on your contact list is online and trying to connect with you. Once you initiate a chat session with the individual, you can exchange voice or text messages.

Keep instant messages simple and to the point. Cover only one subject in each message to prevent confusion and inappropriate responses. In general, screen space is limited, and speed is essential. Many people use abbreviations and shortened spellings. Be sure reader is familiar with the abbreviations. Avoid them when unsure.

There are some disadvantages to instant messaging. There is no standard for IM services. You and the people you want to instant message must use the same IM system. In addition, instant messaging is not designed for secure use because the messages can be intercepted easily.

Be sure to follow the organization's IM policies. If no specific policy exists, assume personal use of IM is inappropriate in your workplace.

- Restrict contact lists on professional IM accounts to business associates to avoid inadvertently sending a personal message to an associate.
- Learn the options, capabilities and security limitations of the IM system and set the preferences to best suit the use of the system.
- Be alert to the possibilities of virus infections and security risks with messages, attachments and contact lists.
- Save important IM exchanges or logs for future reference.
- Be aware your recipients can save instant messages and the organization may archive the messages.
- Do not use professional IM for office gossip or inappropriate exchanges.

Text Messaging

Text messaging such as text, texting, text message shorthand, text messaging shorthand, person-to-person messaging, p2p messaging, SMS, refers to a brief, electronic message of less than 160 characters sent and received through a wireless network. Text messages, transmitted from mobile phones or handheld devices, gained popularity due to businesses needing to communicate from anywhere at any time.

Text messaging is effective for simple messages communicated between busy people who are mobile or in nontraditional workplaces. Texting is like email, the screen and device size means text messages are short. Like email, text messages can include video and other digital files. Texting, like instant messaging, can be less secure than other communication media. Be sure to follow the organization's policy on limiting its use.

Texting to reach facility occupants and other stakeholders has advantages. For instance, 90 percent of all texts are read within three minutes of being received. People read most text messages because they are generally from known sources and friends.

Avoid using text messages to communicate complicated or vital information. The abbreviating format does not allow for this activity.

Many people prefer to keep business communication relatively formal. It is important not to let the informality of texting spill over into business emails, memos or letters.

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Lesson 4: Writing Memos

This lesson focuses on the following subject:

- Writing memos with calls to action to encourage the intended results.

Introduction

This lesson focuses on elements to make a memo a successful communication tool when conveying messages to FM stakeholders.

A **memo** (short for **memorandum**) is a brief document used for routine, day-to-day communication within an organization. A memo conveys decisions, meeting agendas, policies, internal reports and short proposals. It provides targeted responses to specific topics or questions of interest. A memo brings attention to problems and then outlines solutions to problems. It informs the audience about new information like policy changes or price increases. It persuades the reader to act, such as attend a meeting or change a current procedure. Additional discussion about informative and persuasive memos follows under Purpose of a Memo later in this lesson.

Memos are sent digitally by email, but they may also be printed and distributed as hard copy.

Memos can range in length from a short paragraph to one or two pages. A memo may be sent to a single recipient or several people. Memos are more effective when sent to a small to moderate number of people when communicating organizational or job objectives.

As with email, consider who receives the memo, who is copied and in what order recipients are listed, position or alphabetically by last name. Regardless of who receives it or how it is sent, a good memo involves all the elements of good writing described previously in this course. This lesson focuses on elements to make a memo a successful communication tool.

Purpose of a Memo

A memo is most effective when it connects the writer's purpose with the reader's interests and needs. Select the best audience to receive the memo. For instance, if an issue involves only one person in the department, there is no need to send the memo to the entire FM staff.

Defining the purpose structures the approach in communicating with memo recipients. Examples of reasons for sending FM related memos are:

- Announcing a new FM policy
- Providing a brief update to occupants about progress on a landscaping project
- Conveying specific instructions to service providers about invoicing procedures

Be certain the material is not too sensitive to put in a memo. In such an instance, the best form of communication is interaction face-to-face or by phone.

- The Informative Memo
    - Make the reasons for writing the memo clear to the reader.
        - Explain in the opening why you are writing the memo. See Opening under Parts of a Memo later in this lesson for additional discussion.
    - Write about one subject.
        - This prevents confusion for the reader. If several subjects must be included, either give the memo a general subject line or write a memo for each subject.
    - Begin with general information and move on to the details.
        - Provide background before giving the details. Do not expect the reader to know what the details mean without a point of reference. Organize the information so it makes sense to the reader.
    - Provide only as much detail as the reader needs.
        - To satisfy the needs of as many people as possible, provide the most important information first. Explain what it is, what it means, and why it is important. Direct those who want additional detail to the memo's attachments.
    - Group similar information together.
        - Review the memo, look for similar pieces of information appearing in multiple paragraphs. Eliminate redundant sentences or paragraphs.
    - Provide a point-of-contact for the reader.
        - Include contact information in case the reader has questions or concerns about the content in the memo. Depending on whether the memo is printed or digital, provide a return address, phone number and email address.
    - Avoid use of first person singular.

- o Address the reader as "you." This way, you reduce the likelihood of including your opinion with phrases such as "I think," "In my opinion," or "It is clear to me."
- Stick to the facts.
  - o Distinguish clearly between fact and opinion. Omit statements about which you are unsure. If assumptions are included, write them using the following as an example:
  - o Assuming interest rates do not rise during the next six months...

- The Persuasive Memo

  A persuasive memo provides a complete, logical argument with which the reader cannot disagree. This type of memo must anticipate all the reader's questions and responses and address them.

  - Consider the objective against the reader's attitudes, perceptions and knowledge of the subject.
  - Outline the memo to help construct a complete, logical argument and to identify missing information.
  - Include a plan of action.
  - Avoid controversial issues, opinions and unsupported assertions. Stick to the facts.
  - Present recommendations and rationale before discussing other options that can be considered and rejected.
  - Start the proposal with a strong, confident overview (opening) paragraph.
  - Begin each section with the important ideas.
  - Present arguments in order of importance.
  - Avoid risk and error by using relevant examples. This is an effective way to reduce perceived risk in a recommended action.
  - Gear the argument to the reader's decision requirements, interests and motivations.

Parts of a Memo

- Heading
  - The heading follows this general format:
    - o TO: (reader's name and job title)
    - o FROM: (your name and job title)
    - o DATE: (complete and current date)

- SUBJECT: (topic of the memo)

Use the reader's correct name and job title, even though you might know the individual informally.
Make the subject line specific and concise. For instance:

Write this...	Not this...
Update on Client Satisfaction Survey Responses	Update or Client Satisfaction Survey

- Opening

The opening paragraph indicates the strategy for the entire memo. It is beneficial to write it first to give perspective and direction and identify the purpose and main ideas to cover.

The opening includes:

- The purpose of the memo.
- The context and problem.
- The specific assignment or task.

Include the purpose to clarify the reason for reading the document.

The context clearly explains the event, circumstance or background of the problem.

Explain what you are doing to solve the problem. For example, if action was requested, you might state the task as follows:

You asked me to look at . . .

Include only as much information as the decision maker needs. Make sure the purpose statement divides the subject into the most important topics the decision maker needs. If there is difficulty stating the task, review whether the problem was clearly stated. You may need to revise the problem statement.

- Summary
  - This part of the memo provides a brief statement of the key recommendations. They help the reader understand immediately the key points of the memo. The summary might include any references to methods and sources used in the research

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- Discussion
  - This is the longest part of the memo. It includes the supporting ideas, facts and research to back up the argument in the memo. These are the strong points and evidence to persuade the reader to follow the recommendations.
  - State the key findings or recommendations first. Next, state the most general information and move to the specific or supporting facts. Follow this process when including details; move from strongest to weakest.
- Closing
  - End the memo by stating what actions the reader should take and what benefit the reader could receive from those actions. For example:

    I will be glad to discuss this recommendation with you during our trip to the new facility and follow through on any decisions you make.
- Attachments
  - Document the findings or provide detailed information when necessary. Do this by attaching lists, graphs, tables, etc. at the end of the memo. Refer to the attachments in the memo and add a notation about what is attached below the closing.

A standard memo is divided into parts to organize the information to achieve the writer's purpose.

Standard Memo Format

Many organizations have a standard format for memos. Make sure to follow any established organizational style guidelines. If no internal style standards are in place, follow the general guidelines of business writing.

A memo is usually one to two pages long, single spaced and left justified. Instead of indenting the first line of a new paragraph, skip one line between paragraphs. The following tips and techniques help make the memo easy to read.

Headings, Lists and Sections

To make it easy to read, organize the memo's content. Consider dividing content using headings, lists or sections.

Write short, clear headings. The major headings should be part of the purpose statement in the opening paragraph.

Use lists to help be concise. Put important points or details in lists rather than in paragraphs when possible. Lists draw the readers' attention to the section and help them remember the information better.

Consider allocating the sections of the memo as follows:

1. Header: 18 of the memo
2. Opening, Context and Task: 1/4 of the memo
3. Summary, Discussion: 1/2 of the memo
4. Closing, Necessary Attachments: 18 of the memo

Inserting Additional Pages

If the memo requires more than one page, use a second page header placed in the upper left corner. Include an abbreviated subject line, the page number and the date.

Example of Additional Page Header
Subject Line
Page #
Date

Editing Your Memo

Ask the following sets of questions while editing the first draft of the memo.

- Is It Clear?
  - Is the flow of the memo logical?
  - Will the reader understand the development of the idea?
  - Are the words simple and concrete?
  - Will the reader understand technical terms?
  - Is every sentence clear, unambiguous and easy to read?
- Is It Complete?
  - Will the reader understand the purpose?
  - Does the memo contain all the background information the reader needs to know?
  - Is it accurate?
- Is it Persuasive?
  - Are the arguments in order of importance?

  - Have all anticipated potential questions and responses been dealt with?
  - Have all exaggerations been avoided and is there a balanced, rational argument?
  - Are opinions and facts separated and clearly labeled?
- Min-max group
  - Do you have too many arguments?
  - Did you waste words telling readers what they already know?
  - Do you have unnecessary words, phrases or sentences?
  - Should any large blocks of type be broken up?
  - Did you leave adequate margins?
  - Is the memo neat, clear and legible?
  - Does the memo contain misspellings, or typographical or grammatical errors?

Getting Feedback

Unlike a phone call or a face-to-face conversation, a memo can be referred to repeatedly. Say something inappropriate over the phone or in a personal conversation and only one person may hear it. As a written document, many people may see an error in a memo. For example, a memo may become part of a project record.

If a memo will be widely circulated or conveys news that necessitates diplomacy, consider testing it with members of the intended audience. Solicit feedback about clarity, completeness and tone. Piloting a memo in this manner allows for modifications before mass distribution to the target audience.

Exercise all the care and professionalism with memos as with other important print communications – word choice, accuracy, clarity and the other elements of good business writing.

Lesson 5: Writing Business Letters

This lesson focuses on the following subject:

- Writing business letters with calls to action to encourage the intended results.

Introduction

This lesson focuses on elements to make a letter a successful communication tool when conveying messages to FM stakeholders.

Some communicated matters require a bit more formality and precision. Letters are the best means to achieve this. This communication is printed on organizational letterhead. This enhances FM professionalism as it conveys formality, respect and authority. A letter is sent to stakeholders outside your organization. Like a memo a good letter is crisp, concise and organized so the reader can follow and understand with a minimum of effort what is being conveyed.

A letter may be an effective means to communicate with a person who receives a high volume of email and other electronic messages.

Anatomy of a Business Letter

A letter contains certain elements. This section, discusses these elements in order of placement, provides tips and techniques for ensuring that letters convey FM professionalism.

- Heading
  - Unless there is a letterhead, place the full address and the date in the heading. If there is a letterhead with the company address, only enter the date three lines below the last line of the letterhead.
  - Include your email address or phone number, if the recipient needs it. Don't include your name in the heading because it appears at the end of the letter.
  - Begin the heading about two inches from the top of the page.
  - Spell out words such as "street," "avenue," "first" and "west" rather than abbreviating them.
  - The date goes beneath the last line of the return address. Write the date in full without abbreviations, if the letter is sent by postal mail.

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  - The format for writing the date in the United States is different from the format in other countries. Only the United States, Belize and Micronesia use the Month-Day-Year format. Canada and the Philippines use this format as a second option. The rest of the world uses the Day-Month-Year format.
  - When writing the date in a formal letter in the United States, the date is "December 1, 2020." In other parts of the world, the date is "1 December 2021." When writing the date in a formal European letter, do not add a comma.
  - Some countries created their own rules for formatting dates. For example, many Asian countries write the date in what is known as the big-endian form. This means a date for a formal letter would be written as "2021 December 12" with no punctuation. In Hungary, the date in a formal letter is written as "2021. december 12" with a full stop after the year and with the month uncapitalized.
  - If the letter is to be sent in the body of an email, do not write the date. The email application automatically marks the date on the message. Do not include addresses either. You can start with the salutation.
- Inside Address
  - Enter the recipient's full name, title and address correctly in the inside address two to six lines below the date, depending on the length of the letter.
  - Align the inside address with the left margin, which is at least one inch wide.
- Salutation
  - Place the salutation, or greeting, so it aligns with the left margin and is two lines below the inside address. In most letters, the salutation includes the recipient's personal title for example, Mrs., Ms., Dr. and last name followed by a colon. You may use only the first name, if you know the recipient and are on a first name basis with the individual.
  - Address women as "Ms." Unless they prefer "Miss" or "Mrs." Professional titles such as Senator, Doctor, Major take precedence over Ms. and similar courtesy titles.
  - When a person's first name could refer to either a woman or a man, and you do not know the individual, one solution is to use the first and last names in the salutation for example, Dear Leslie Brown. Avoid "To Whom It May Concern" because it is impersonal and dated.
  - For multiple recipients, consider using "Dear Colleagues:" Members or other suitable collective term is appropriate.
- Subject Line
  - Although a subject line is optional, it follows the salutation when used. Insert one blank line above and one blank line below the subject line.

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- The subject line functions as an aid in focusing the letter. It is especially used if writing to a large company and the recipient's name or title is unknown. In this case, do not use a salutation. Either address the letter to an appropriate department or identify the reason for the letter in the subject line.
- In other circumstances when the recipient's name is unknown, use a title appropriate to the context of the letter for example, Dear Customer Service Professional.

- Body
  - Begin the body of the letter two lines below the salutation, or any element preceding the body, such as the subject line or an attention line.
  - Single-space within a paragraph. Double-space between paragraphs. To provide a fuller appearance to a short letter, increase the side margins or increase the font size. Insert extra space above the inside address and the signature block. Do not exceed twice the recommended space for each of these elements.
  - Consider the reader's time. State the purpose of the letter and the main point. Then, begin justifying its importance. Continue building the justification with background information and supporting details. In the closing paragraph, restate the purpose of the letter and request some type of action if appropriate.
  - Occasionally, a short leading paragraph to promote goodwill may be socially and culturally appropriate. Be careful in doing this. It may have the reverse effect and be perceived as annoying.
- Complimentary Closing
  - Type the complimentary closing two spaces below the body. Use a standard expression for example, Sincerely, Sincerely yours, Yours truly. If the recipient is a friend and a business associate, use a less-formal closing for example, Best wishes, Best regards, Best.
  - Capitalize only the initial letter of the first word. Follow the expression with a comma.
- Signature Block
  - Type your full name four lines below and align with the complimentary closing. Include your business title on the next line, if appropriate. The next lines may contain your individual contact information, such as a phone number or email address, if the information is not in the letterhead or the body.
  - Sign the letter in the space between the complimentary closing and your name.

- Enclosure Notations
  - At times, business letters require additional information to be placed two to four lines below your name and title.
  - Enclosure notations indicate you are sending material with the letter. Mention the enclosure in the body of the letter and then list them at the end of the letter in one of the following forms:
    - Enclosure: Final Safety Report
    - Enclosures (2)
    - Enc. Or Encs.
  - Copy notation ("cc:") indicates to the reader a copy of the letter has been sent to the named recipient (cc: Safety Committee).
  - A blind copy notation ("bcc:") appears only on the copy, not on the original letter. That is, the reader does not see the recipient's name.
- Continuing Pages
  - If the letter requires a second page, always carry at least two lines of the body text over to the second page. The second page has a header with the recipient's name, the page number and the date. Place the header in the upper left corner of the page.
  - Use plain paper of quality equal to that of the letterhead stationery.

Lesson 6: Writing Business Plans

This lesson focuses on the following subject:

- Creating an FM-related business plan

Introduction

This topic provides guidelines for writing a business plan.

A facility manager might not write an FM business plan often but it can significantly impact how the FM function is perceived by the organization, how the department is funded or whether FM completes projects.

Many types of FM business plans and reports exist. What they are called, the structure, content and purpose vary widely across organizations. It is a challenge to provide a good definition of either kind of communication. Plans and reports, do have fundamentally different purposes. This lesson discusses business plans. Lesson 7 discusses business reports.

Business Plans

A **plan**, which is usually confidential, states what should happen regarding a project. It is characterized by goals. A plan is methodically implemented in stages with appropriate resources, while maintaining its aim and goals.

A plan may include visual and graphical representations such as blueprints, floor plans and outputs from software. A plan may be financial in scope, and include one-, three-, five- and ten-year budget plans; a 20-year life cycle costing plan such as a capital action plan; or a five-year world class maintenance plan to move an organization from reactive to predictive. Alternately, a plan might describe an HVAC upgrade through the addition of supplemental units. It might examine transition to energy-efficient lighting or the addition of in-house food services. This lesson focuses on written plans.

Elements of a Business Plan

The audience has three possible courses of action when reviewing a plan. They can:

- Approve the plan.
- Send the plan back to FM for revision.

- Reject the plan.

The plan should contain a purpose statement, facts, recommendations and next steps. The words are critical. Simplicity should be a key objective. Avoid unnecessary complexity, because it lessens the chance of approval if marginal or irrelevant content is included.

The specifics of a plan dictate appropriate inclusions. In addition to the elements covered in this topic, the plan may begin with an executive summary. It might include analysis of information, assumptions, and a conclusion or summary. If additional information or side issues need to be mentioned, make sure they are clearly identified as secondary. Placing such information in an appendix works well.

- Clear Statement of the Purpose
  - Make sure to state the plan's purpose clearly.

  Example:

    - The building's automated controls system needs to be updated.
- Supporting Facts
  - Provide accurate, relevant and compelling facts to support the plan's purpose.

  Example:

    - The current building automation system is outdated. Parts are becoming hard to get. With the new version of software, much more energy efficiency and better control of the building systems are available with the new version of system software.
  - As facts are stated, draw conclusions or inferences from them. What principles do the facts support? Are patterns emerging? Are there lessons to be learned?

  Example:

    - The building automation controls system upgrade will cost US$XXX. Based on calculated savings through energy efficiency and fewer service calls to repair outdated parts, the upgraded control will have a payback period of 3.4 years.
- Risks and Alternatives
  - The initial perception of a plan might be that recommendations are straightforward. Most plans have inherent risks.
  - Risks and alternatives may be stated as advantages and disadvantages, or in some similar form. Do not ignore potential risks. Identify them and provide reasonable alternatives.

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Example:

- o To upgrade to the new system, the building must be taken offline. Not all HVAC systems will function. This work will be done over a weekend starting on a Friday night and finishing on Saturday morning. As with any software upgrade, the potential for bugs exists. However, doing this upgrade over a weekend allows for more time to ensure systems are up and running on Monday morning.

- Action Steps
  - State the action required clearly. If the FM plan addresses all the elements described in this lesson, it builds support for the call to action.

Example:

- o I ask that you approve this plan to move ahead with this project to upgrade the building automation controls system and to save the organization money.

Lesson 7: Writing Business Reports

This lesson focuses on the following subject:

- Creating a business report on an FM project

Introduction

This topic discusses elements common to a business **report**, regardless of type.

A report organizes and presents information resulting from an investigation or from a project. Various types of reports exist, such as:

- Feasibility reports
- Formal reports
- Investigative reports
- Progress and activity reports
- Trouble reports

As noted, a report may describe findings, risks, options and recommendations. Some reports may be additions to a plan, while other reports may inform the reader about plan implementation. A report may describe due diligence results or progress on projects such as construction of a new headquarters or the status of a relocation project, provide a year-end review for example, an FM annual report or document incidents.

Every report has a purpose, follows a clear structure and provides facts. Whatever the subject, the account should bring the reader up to date. As appropriate, it may also provide some preliminary indication of what should be done beyond the status quo.

Although reports vary in length, common elements characterize them. Discussion of these elements follows.

Elements of a Business Report

In general, a report consists of three main sections: front material, main body and back material. Table 32 shows the elements a report may include in each section.

Front Material	Main Body	Back Material
• Title page • Letter of	• Executive summary • Introduction	• References • Bibliography

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authorization • Letter of transmittal • Table of contents • List of figures • List of tables • List of symbols and/or abbreviations • Abstract • Foreword • Preface	• Purpose • Method • Materials • Procedure • Results/data analysis • Discussion • Conclusion • Recommendations	• Appendices • Glossary • Index

Table 32 Elements of a Business Report

A report does not need to include all the elements shown in the figure. Specific format and style is a function of organizational standards or practice. It should be as concise as possible while effectively communicating the results or status of the subject. The subject of the report, the intended audience, organizational style and other factors determine which of the elements to include in each report.

- Front Material

  The front material does the following:

  - Explains the writer's purpose.
  - Describes the scope and type of information in the report.
  - Indicates where specific information is covered.

  A title page and table of contents are mandatory, while the intended audience determines what other elements to include in this section of the report.

  The title page includes the following:

  - The full title of the report (the topic, scope and purpose of the report).
  - The name of the writer or writers.
  - The date of the report.
  - The name of the organization for which the writer or writers work.
  - The name of the organization or person receiving the report for example, board of directors or facility occupant

  The table of contents lists all the report's major sections or headings in order of appearance.

A list of figures contains all visuals in the report. It is separate from the table of contents and listed immediately after the table of contents. List the figures when a report has more than five visuals.

When a report includes more than five tables, list them by title and page number in a separate section following the list of figures if there is one. Otherwise, the list of tables follows the table of contents.

- Main Body

  The main body of the report does the following:

  - Provides context.
  - Describes in detail the methods and procedures used to generate the report.
  - Demonstrates how results were obtained.
  - Describes the results.
  - Draws conclusions.
  - Makes recommendations, if appropriate.

- Back Material

  - The back material contains supplementary material, such as appendixes or where to find additional information about the topic/ bibliography. Back material may include a glossary and an index, if the report is large.

What Would You Do in This Situation?

The roof of your facility begins leaking heavily. The FM team must communicate with the occupants to evacuate the building. You and the team determine what the best method is. What would you direct your team to do in a similar situation?

Chapter Summary

Congratulations! You completed Chapter 3 of IFMA's Communications Course.

This chapter focused on helping you get your message out through effective written communication. The learning objectives were to:

- Discuss the basics of correspondence.
- Describe the writing elements for creating effective email and instant messages.
- Write an email with a call to action to encourage the intended result.
- Describe the writing elements for creating effective memos and letters.
- Write memos and letters with calls to action to encourage the intended results.

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- Describe the writing elements for creating a business report.
- Describe the writing elements for creating a business plan.

Chapter 3: Progress Check

1. Email Etiquette
   a. Check the spelling.
   b. Do nothing.
   c. Proofread it entirely.
   d. Check the grammar.

2. Texting is less expensive than other forms of communication for the FM staff to reach facility occupants.
   a. True.
   b. False.

3. What statement best describes a memo?
   a. It is lengthy and in-depth.
   b. It is detailed and formal.
   c. It is verbose and succinct.
   d. It is short and concise.

4. The subject line is optional in a letter. What is its function when it is used?
   a. It indicates who is to receive the letter.
   b. It conveys formality and authority.
   c. It aids in focusing the letter for the reader.
   d. It begins the letter's organization for the reader.

5. Why is it important to know how to write an FM business plan? Select all the answers that apply.
   a. It impacts organizational perception of FM.
   b. It provides ongoing status of projects.
   c. It determines how FM funds projects.
   d. It influences whether FM completes projects.

6. What is the purpose of front material in a business report?
   a. It demonstrates how results were obtained.
   b. It contains supplementary material.
   c. It describes methods and procedures used.
   d. It indicates where information is covered.

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Chapter 4: Conducting Effective Meetings

Lessons

- Objectives
- Lesson 1: Fundamentals of a Meeting
- Lesson 2: Conducting a Virtual Meeting
- Lesson 3: Making a Presentation

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Objectives

Chapter 4: Objectives

On completion of this chapter, you will be able to:

- Define the basic types of meetings.
- Define the purpose of a meeting.
- Understand what is necessary to plan and conduct a successful meeting.
- Apply global considerations to a scheduled meeting.
- Understand how to structure a presentation that conveys an effective message.

This chapter focuses on helping prepare and conduct effective meetings, whether in person or virtually.

A **meeting** is a gathering of two or more people in which a purposeful exchange or transaction occurs based on a common interest, purpose or problem. The best meetings solve problems, build consensus, provide training, gather opinion or move an organization forward.

Meetings are vital to communication within organizations. They allow people to share information, to work toward achieving common objectives and to produce better results through collaboration.

Meetings are the most universal part of business. Increased communication by email, instant messaging and text messaging minimizes the need for meetings. The opposite may be true due to more work being team based and fewer people being qualified to do the work.

Well planned meetings leave attendees feeling energized due to a sense of satisfaction and accomplishment. Attendees perceive badly planned meetings as futile, boring, time wasters and inconvenient. They waste time and money when they are unproductive or cover issues unrelated to the called meeting. The more time people spend in ineffective meetings, the more anxious and stressed they become.

Meetings are resource intensive, requiring the participants' time. It is beneficial to respect their time as you plan and conduct meetings.

A good meeting is distinguished from a bad one by preparation, organization and structure. The perception of you as an effective facility manager may be based on how well you conduct meetings.

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Lesson 1: Fundamentals of a Meeting

This lesson focuses on these subjects:

- Types of business meetings
- Purpose of the meeting
- Planning a meeting

Introduction

This topic provides an overview of meetings, including determining the purpose of a meeting, preparing for the meeting and conducting the meeting.

As organizations focus more on efficiency, productivity and profitability, it is essential to ensure resources such as time, money and personnel are used effectively. One significant area is to assess how meetings are run. It is likely you have attended poorly run meetings, which included the wrong people and failed to have concrete objectives. Improving how you conduct meetings has an immediate impact on improving time management, engagement and team collaboration.

This lesson also provides tips and techniques you can apply to improve the meeting experience for all attendees. These apply to your planning regardless of the type of business meeting you conduct. Before discussing these tips and techniques, the following section briefly describes five common types of meetings.

Types of Business Meetings

This section describes five of the most common types of business meetings you might conduct as a facility manager. They are:

- Status Update.
- Decision Making.
- Problem Solving.
- Team Building.
- Idea Sharing.

It might seem unnecessary to describe the type of meeting however, it helps establish a clear agenda and saves time and helps the attendees prepare.

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- **Status Update Meeting -** This is a recurring meeting where the staff share updates on the latest projects to ensure everyone is aware of the progress and process of the projects. This meeting helps minimize lost time by clarifying any communication misunderstandings.

  Although this type of meeting might not be fun or engaging, any issues your staff have can quickly be addressed, tasks assigned and decisions made that move projects forward effectively. This meeting is likely to stay within the scheduled time.

- **Decision Making Meeting -** Although smaller decisions may be made in a status update meeting, discussions involving important decisions often occur in a larger group and take place in the decision-making meeting. The process of decision making may be spread out over several meetings and result in increased communication so all parties can gather information and present solutions. This leads to a consensus on the best solution to enable moving forward.

- **Team Building Meeting -** Every meeting provides a chance for the team to bond and create closer relationships. There are times when planned team building meetings are beneficial.

  These meetings can be events or outings for everyone in the FM department to generate employee loyalty and engagement. They allow employees to mingle and create more personal relationships to aid the progress and growth of the FM function and the organization.

- **Problem Solving Meeting -** Like a decision-making meeting, a problem-solving meeting is scheduled to deal with a specific goal. This kind of meeting is crucial even though an issue, and how it is solved, depends on the organization. It may be based on an emergency to be resolved quickly. The source of the problem may be unknown. There could be several priorities to manage to find the best solution to the problem. This kind of meeting gives the team time to brainstorm, evaluate solutions and solve the problems as quickly as possible.

- **Idea Sharing Meeting -** At times, it is beneficial to have the members of the FM function meet and share new ideas for improving the FM function or for providing better service to facility occupants. It is more efficient than resorting to a long email or chat thread to communicate the ideas.

  Not only does an idea sharing meeting allow more in-depth insight on a topic, it also enables conversations and questions in real time. This meeting makes idea sharing interactive, ultimately resulting in more teamwork, stronger relationship building and an engaging meeting experience.

Purpose of the Meeting

The first thing to decide before scheduling a meeting is whether it is worth the time. This includes focusing on the desired outcome by asking questions to help determine the meeting's purpose. Ask yourself questions such as the following:

- Do you need to communicate something important to a stakeholder group or groups?
- Is it necessary to brainstorm ideas?
- Do you need a decision?
- What should participants know, believe, do or be able to do after attending the meeting?

If it becomes evident a meeting would serve no valuable purpose, then do not schedule it.

The decision to schedule a meeting occurs when there is a clear purpose and objectives. Once the desired outcome is reached, use the information to write a purpose statement to answer the questions of "what" and "why."

In facility management, several reasons for scheduling a meeting exist. The following example illustrates this.

Example:

Your department has a facility upgrade project. You schedule a meeting. The purpose is to conduct a final review and get approval from department managers.

(Consider answers to the questions listed earlier in this section, which would be valid responses for scheduling a meeting. With a clear purpose and objective in mind, complete the following sentence to determine the need for the meeting.)

At the end of the meeting, I want participants to:

- Identify their department representatives by next week.
- Encourage employees to attend the information meetings in the large conference room.
- Determine the budget changes needed for implementing the upgrade project.

Once you determine the meeting's purpose and objective, begin preparing for the meeting.

Effective Meeting Preparation

Preparing for the Meeting

Effective meeting preparation involves consideration of the following elements:

- Who is to attend the meeting?
- What is the format of the meeting? At what time? Where?
- What is the meeting's agenda?
- What are the attendees' roles and responsibilities?

The rest of this section discusses each element.

- **Determining Attendees** - Who attends a meeting significantly affects its content and quality. No set rules exist about who and how many people should attend a meeting. This depends on the meeting's purpose and objectives. Figure 7 shows the general correlation of attendees and the importance of decisions.

If the meeting is intended to . . .	Then, the meeting group size. . .
Share information with as many people as possible . . .	Can be as large as necessary.
Build consensus through interaction . . .	Should be evaluated (too many can limit creativity and too few can limit input and hinder outcomes).

Determine the key people who need to attend the meeting. If some of the key participants are unable to attend, then ask them for their contributions before the meeting. Alternately, invite them to attend virtually. Distribute the meeting notes to everyone, including those participants unable to attend.

Bringing the right mix of people together prevents "groupthink." Groupthink generally describes behavior resulting from like-minded thinking and a reluctance to share unpopular or dissimilar ideas with others. When the groupthink phenomenon occurs, meeting participants may prematurely make decisions, some of which might have lasting consequences. Bringing the right mix of people together also promotes diverse thinking and facilitates well-rounded discussion and decision making.

When selecting meeting participants, expertise is important. Consider who can help to achieve the meeting objectives. For example, if the purpose of the meeting is to resolve a problem, it might be prudent to invite people affected by the problem as well as individuals who can make final decisions about the necessary actions to resolve the problem.

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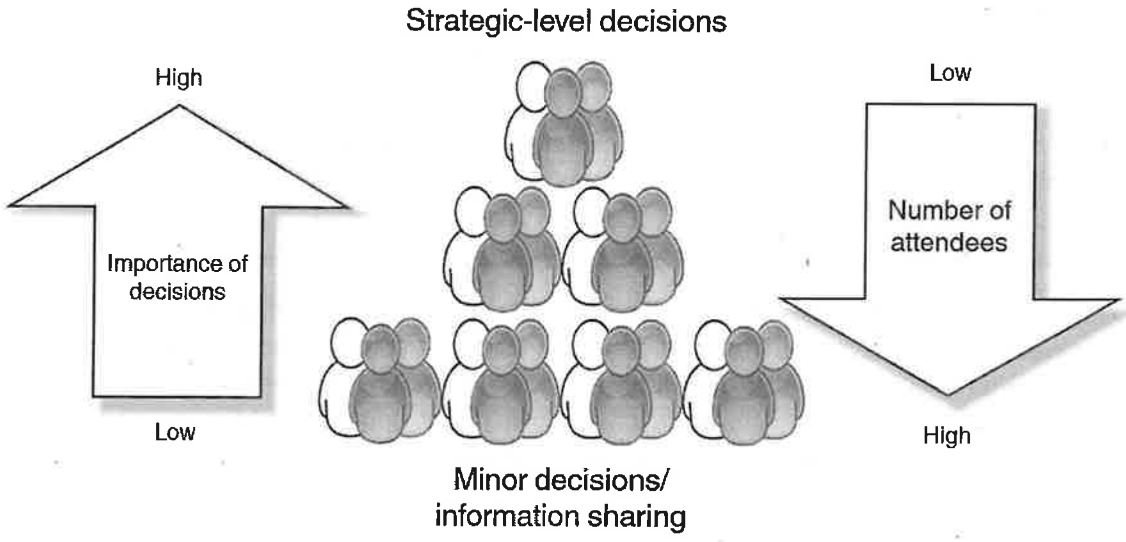

Figure 7 Correlation of Attendees to Level of Decision

- **Determining Meeting Format -** Not all meetings need to be in-person. With globalization of the marketplace and the rise in video conferencing technologies, participants are attending more virtual meetings. The concept of virtual meetings is discussed in Lesson 2, Conducting a Virtual Meeting.
- **Selecting Meeting Time -** Regardless of the meeting format, a meeting should stipulate a start and end time so participants can plan their schedule accordingly. Schedule the meeting for a time when all or most of the key people can attend. Consider other factors, such as those in the following list that can influence scheduling meetings:
    - Remote participants need consideration for their time zones.
    - Monday morning is often a time people prepare for the coming week's work.
    - Friday afternoon is often when people focus on completing the current week's projects and finishing the work week.
    - Long meetings may need to include breaks to allow participants to respond to messages and to refresh themselves.
    - Meetings held during the last 15 minutes of the day are quick. However, few people remember what was covered.

  Setting a meeting time frame also sets expectations. Participants understand they have a specific amount of time to accomplish the meeting objective. Without time parameters, discussions often fill the time. If a meeting time is left open-ended, discussions could drift on aimlessly and waste time.

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- **Selecting Meeting Location** - Location can also influence meeting effectiveness. A good location does not guarantee a productive meeting. A bad meeting location can lead to a multitude of distractions and derail potential productivity.

  The size of a meeting room, the seating arrangement, the atmosphere for example, formal or informal and environmental factors, such as temperature, light and noise, are things to consider when planning a meeting. If the meeting is off-site, expenses and ease of access are additional factors to consider.

  Having the meeting at the organization's location provides an advantage. Holding the meeting at someone else's organization can signal a spirit of cooperation. It might be a good idea to meet at a neutral site when people are meeting for the first time or when the meeting includes discussing sensitive issues. In this way, no one gains an advantage, attendees may feel more inclined to participate.

Creating the Agenda

Productive meetings require structure and planning. Once the meeting attendees, format, time and location are established, create an **agenda**. An agenda serves several important purposes. The agenda:

- Helps use time wisely.
- Informs participants of the meeting subject and objectives in advance.
- Helps ensure that the meeting sticks to relevant topics.
- Keeps the meeting running on target and on time.

Factors to consider for creating a meeting agenda include:

- Meeting type (purpose)
- Priorities (Issues/topics to be discussed)
- Attendees
- Format
- Date, time and location
- Objectives/desired outcomes
- Meeting pre-work for example, background information to read in advance
- Materials participants should bring to the meeting
- Roles and responsibilities for example, who chairs the meeting, who facilitates the meeting, who records minutes

Depending on the meeting purpose, not all the items listed here may apply. Always prepare an agenda for a meeting, even if it is only an informal list of main topics. Table 33 shows a sample agenda.

IFMA Chapter Meeting - Agenda

Olympic Hills Center

1900 / 07:00 PM DD/MM/YY

Welcome/purpose	10 minutes	Evelyn
Introduction of members	5 minutes	Evelyn
Review of minutes and action items from previous meeting	5 minutes	Evelyn
Review of the March facility tour report	10 minutes	Mike
20XX FMP/CFM training	10 minutes	Sandra
20XX World Workplace Conference	10 minutes	Yemi
Lecture of the month, "Maintaining the Real Estate Master Plan – Overview of Havana Estate Disaster Recovery Experience"	20 minutes	Winston
Lecture questions and answers	5 minutes	Open to all
Other issues and concerns	5 minutes	Open to all
Review of meeting action items	5 minutes	Open to all
Close of meeting	5 minutes	Open to all

Table 33 Sample Meeting Agenda

Ideally, distribute the agenda to attendees one or two days before the meeting. For a longer meeting in which participants make presentations, distribute the agenda one week or more in advance. Table 34 provides a sample email to accompany the agenda.

From:	
To:	Anticipated Attendees' Emails and Names
Subject:	Monthly Chapter Meeting with Training Session
Attachments	Meeting Agenda.dox (29 KB)

Purpose of Meeting:
The purpose of this meeting is to provide training on maintaining a real estate master plan.

Date, Time and Location:	
Date:	Friday, May 15, 2020
Time:	5:30 p.m.- 700 p.m.
Place:	Olympic Hills Center, Conference Room
Attendees:	
Those addressed above to attend.	
Meeting preparations:	
No preparation required.	
Agenda:	
See the attached document.	

Table 34 Sample Email to Accompany Meeting Agenda

If the meeting is not being recorded, delegate the minutes-taking to someone other than the chair of the meeting. For a standing committee, it is best to rotate the responsibility of taking minutes. The minutes taker should record major decisions made and tasks assigned. To avoid misunderstandings, the minutes taker records each assignment, the person responsible for the assignment and the date on which it is due.

Roles and Responsibilities

The likelihood of an effective and productive meeting increases when **roles** and **responsibilities** are filled. Table 35 provides a list of typical roles and responsibilities. Roles vary or are optional depending on the meeting purpose, the meeting atmosphere (formal or informal), the meeting structure and the number of participants. Alternately, one person may fill more than one role.

Role	Key Responsibilities
Chairperson/chair (meeting manager)	• Exercise authority to make decisions.
Facilitator	• Maintain focus on agenda • Cultivate an unbiased and impartial environment. • Elicit participation from others. • Protect other members from personal attack.
Recorder	

(note-taker or scribe)	• Keep an accurate record (meeting minutes) of what happens during the meeting.
Timekeeper	• Remind the group how much time is left for agenda items (if the agenda specifies time limits for individual items).
Note-keeper	• Make notes on a whiteboard, flip chart or blackboard as ideas are generated. • Make notes of what is discussed.
Meeting participants (group members)	• Participate and contribute to meetings. • Practice active listening. • Respect other participants' views without interrupting.

Table 35 Common Meeting Roles and Responsibilities

Roles and responsibilities differ according to culture. For instance, in the Middle East, the person who speaks least during a meeting is the person with power. The facilitator handles the practicalities. A facilitator cannot demand action from other participants.

As another example, a meeting chair is referred to as the "convener" in some European countries. Typical responsibilities are to create and agree on a consensus, to direct and focus the discussion, and to involve all the attendees in the process. Most meetings do not have a facilitator; the convener serves in that role.

Conducting the Meeting

The facility manager, who calls the meeting, may be the chairperson. FM usually serves as the meeting **facilitator** or **convener**. Ultimately, the facilitator's role is flexible and accommodates the needs of the group. The following tips and techniques contribute to being an effective facilitator.

Tips and Techniques

Tips and Techniques for an Effective Facilitator

If meeting participants are unfamiliar with you or the meeting process, explain your role, the meeting process or both. As a facilitator, you do not normally get involved in the meeting content. On occasion, you might step outside your neutral role. If you do, make it clear to participants this is what you are doing.

Your key job as the facilitator is to:

- Ensure meeting ground rules are followed (e.g., people fulfill assigned roles, participants put aside any personal agendas during the meeting).
- Encourage reluctant people to speak.
- Ensure no one dominates the meeting.
- Ensure all participants are listening and understanding.
- Legitimize participants' perceptions and feelings.
- Check for agreement.
- Maintain or regain focus on the meeting agenda or topics being discussed.
- Help resolve any conflicts that may arise.
- Summarize the discussion periodically.
- Help with reaching consensus.
- Gauge the energy level during the meeting and provide short breaks during a long meeting, if necessary.

To expand on these points, consider the following during the meeting:

- As you work to keep to the agenda, consider the feelings, thoughts, ideas and needs of others. Create a productive environment by allowing room for differing views and fostering an environment in which participants listen respectfully to one another.
- Help other participants feel valued and respected by listening to them and responding to what they say. Respond positively to their comments whenever possible.
- Consider communication styles and approaches of other participants, particularly those from other cultures.

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Dealing with Conflict

Conflict is inevitable despite all the best efforts. It is valuable when managed positively. Conflict can stimulate creative thinking by challenging complacency and by showing ways to achieve goals more efficiently or economically. This section provides tips and techniques for handling conflict initiated by the interruptive, negative, rambling, overly quiet and territorial personality types.

The Interruptive Person

- This person rarely lets anyone finish a sentence and intimidates the quieter attendees. In a firm but non-hostile tone, tell this person to let others finish in the interest of getting everyone's input. By doing this, you signal to the group the importance of making common goals priority.

The Negative Person

- This person has difficulty accepting change and considers a new idea from a negative perspective. If left unchecked, this attitude demoralizes the attendees and suppresses enthusiasm for new ideas. If the negative person brings up a valid point, ask the attendees for suggestions to remedy the issue raised. If the negative person's reactions are not valid or outside the agenda, then recommend a separate meeting to address those issues.

The Rambling Person

- This person has trouble collecting thoughts quickly enough to verbalize them succinctly. Restate or clarify this individual's ideas. Strike a balance between providing your own interpretation and drawing out the person's intended meaning.

The Overly Quiet Person

- This person may be timid or may be deep in thought. Ask for this individual's thoughts, while being careful not to cause embarrassment. An alternative is to have a quiet person write the thoughts down and give them to you later.

The Territorial Person

- This person defends against real or perceived threats. This individual may refuse to cooperate with attendees. Point out to the person the stated concerns may be valid, but everyone is working toward the same overall goal, which takes precedence.

Meeting Actions

Post Meeting Actions

Just before closing the meeting, review all decisions and assignments. Paraphrase each decision and assignment to help everyone focus on what the participants agreed to do. In addition, reviewing the decisions and assignments ensures the minutes are complete and accurate.

This is the time for participants to raise questions and to clarify any misunderstandings.

Set a date by which everyone can expect a copy of the minutes.

Thank everyone for participating and close on a positive note.

Two documents should be created in addition to the minutes: the **action plan** and **meeting summary**. They are sent to the meeting's participants. As appropriate, other stakeholders affected by the meeting outcomes and actions taken receive copies of these documents. Additional discussion of each document follows.

The Action Plan

As stated, one of the meeting protocols is to clarify any action steps and related responsibilities. This results in an action plan, which provides meeting closure, gives participants a sense of accomplishment and serves as a road map for moving forward.

The meeting recorder documents the action items for reference as needed. The action plan, which is distributed with the meeting summary, addresses the following:

- What needs to be done because of the meeting?
- Who is responsible for each task?
- When must tasks be completed?

If time allows, then possible challenges or roadblocks to completing tasks indicated in the action are discussed. An individual should be assigned to resolve the challenges or roadblocks.

When developing the action plan, consider the following:

- Resources needed
- Individual(s) providing input
- Individual(s) providing authorization or permission

As due dates approach, check with the people assigned to action items to see if their progress is on track for completion or if adjustments are required.

Providing Summary of the Meeting

At a minimum, prompt distribution of a summary within one or two days of the meeting is advisable. It includes the names of the attendees, meeting objectives, key topics discussed, decisions made, and the action plan.

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Lesson 2: Conducting a Virtual Meeting

This lesson focuses on these subjects:

- Types of virtual meetings
- Best practices
- Global meeting considerations

Introduction

This topic focuses on your enabling the FM staff to get work done from anywhere, resulting in easier and faster virtual collaboration.

A virtual meeting takes place when two or more people meet from remote locations rather than travel to meet in person. A virtual meeting may be audio only, or audio and video. The attendees may watch a presentation passively or they may engage in active discussion and share documents.

A facility manager, uses virtual meetings in various scenarios, such as:

- The team being in multiple locations and different time zones.
- Employees working from home.
- Service providers, facility occupants and others in different locations.

Types of Virtual Meetings

As stated, with globalization of the marketplace and the rise in video conferencing technologies, participants are attending more **virtual meetings**. Common meeting formats are teleconference, video conference and Web conference. Whatever virtual meeting format, the solution should be easy to use and available to everyone invited to the meeting.

- **Teleconference -** The teleconference, or conference call, is between two or more participants. It is a less expensive alternative to face-to-face meetings requiring travel. They work best when the person coordinating the call uses an agenda shared by all participants and directs the call as if chairing the meeting in person. Participants can use the Internet during the teleconference to share and view common documents. If decisions are reached during the call, follow it up with written confirmation sent to all participants.

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During a teleconference:

- Call in from a quiet location to eliminate distracting background noise.
- Sit near the phone's base to eliminate static if you are on a cordless phone.
- Put your phone on hold during the meeting. Beeping, ringing or recorded messages may interrupt the meeting.
- Be aware of whether your phone is on mute.
- Avoid shuffling papers.
- Identify yourself when you are speaking.

- **Video Conference -** The video conference is useful for meetings when travel is impractical. Unlike teleconferences, people see and hear each other during the meeting by video feed provided through monitors and cameras.
- **Web Conference -** In a Web conference, participants' computers may be connected to those of other participants through a downloaded application, like Zoom or Microsoft Teams, installed on each of the attendees' device. In such a conference, a moderator controls the screen. Attendees share documents, view slide presentations when the moderator relinquishes control of the screen to others. A well-run web conference is equivalent to an in-person meeting for informing the attendees, gaining shared understanding on complex and important issues, and reaching consensus on actions to be taken.

Best Practices

Most standard meeting rules apply to virtual meetings. This section discusses additional practices to help ensure virtual meeting success.

Note: not all practices apply in every virtual meeting scenario. Consider what is appropriate for your virtual meeting.

- Preparation
  - Ensure you have all meeting materials for example, cables and monitors lined up in advance to prevent wasting meeting time.
  - Check with remote attendees the day before a virtual meeting to ensure they have downloaded any necessary files.
  - Send out meeting reminders.

  - Develop an agenda and use meeting time wisely. For example, do not spend time reviewing a document that participants can read/review outside the meeting. Optimize meeting time for presenting, brainstorming and interacting.
  - For routine/recurring meetings, rotate the meeting roles among participants to keep everyone engaged.
- Implementation
  - Take a roll call, either verbally or by scanning the images of people on screen to be aware of exactly who is participating.
  - Ensure that all participants can hear/see each other.
  - Establish ground rules for meeting conduct for example, how to remain on mute when not speaking, how to make a comment or how to ask a question.
  - Speak loudly and clearly.
  - Do regular sound checks to ensure that everyone can hear, especially if they are not active meeting participants.
  - Check with participants if the meeting gets too quiet. Be sure there are no technology issues. Ask participants if they understand or are confused about a point.
  - End the virtual meeting as you would a standard meeting for example, with questions and answers, issues and concerns, and next steps.
- Participation
  - Pay attention to participants' tone of voice and other nonverbal clues.
  - Adhere to good cross-cultural practices.
  - Eliminate as many distractions as possible.
  - Minimize background noise and interruptions.
- Etiquette
  - Be on time for the call.
  - Wear proper business attire for your respective role.
  - Listen carefully and pay attention to what is being presented.
  - Be considerate. Let others speak.
  - Do not interrupt, even if you feel you have an important point to make.
- Professional Remote Office - You may be working from home more. As a result, you may attend more virtual meetings at home. This section contains suggestions on creating a professional environment.

Work from a quiet room.

- Common sources of noise are sounds coming through open windows, or people and pets causing noise throughout your residence.
- An empty, uncarpeted room causes hollow, echoey audio which distracts the other attendees. Carpeted rooms tend to create the best audio during a Web conference. If your room has no carpeting, laying an area rug and some floor pillows can reduce reverberation and create a warmer sound.

Use a neutral background.

- Although plants, bookcases or picture frames in your background are not necessarily a problem, the safest approach is to have a neutral-colored background. This reduces distractions from the content you are presenting.

Create good lighting.

- Dimly lit rooms appear unprofessional and dated. Make sure your desk has a strong but soft light to illuminate your face during the meeting. You can tweak this according to daylight conditions to create uniform lighting on your face

Use your laptop or desktop, not your smartphone.

- Some people opt to attend virtual meetings on their smartphones due to being in transit or due to the convenience apps provide. Use your laptop or desktop when possible. This allows you to take notes easily. In addition, it provides for having a stable image, which is impossible if you opt to turn on the phone's video.

Dress the part.

- You may feel it is fine to dress very casually if you are on an audio only call. Dressing professionally for all calls is highly recommended. Dress as you would if you were meeting the other participants in person. Even if not everything you have on is seen on screen, it affects how you feel, which affects how you speak and interact.

Pilot-test a new Web conferencing tool before your initial meeting use.

- Become familiar with the technology and troubleshoot any potential glitches. On initial use, many virtual meeting programs require you to grant screen sharing, audio access and webcam permissions. You want to set these in advance.

Use a good microphone for better sound.

- Consider using an external microphone rather than the built-in microphone in your computer. Alternately, consider switching to a headset or to the earphones from your phone to create a consistent, conversational sound profile.

Position the conference window near your camera.

- Raise your webcam to eye level so your image looks more natural.
- Make the conference application as small as possible and position it next to your computer's camera. When you look at the video image of the person you are talking to, your gaze seems more like you are looking directly at that individual.

Look at the camera, not the screen, when talking.

- This takes practice because it is natural to look at someone's image as done in person. Looking at the camera instead makes a stronger connection. This is due to making it seem like you are looking directly at the person you are talking to or listening.

Turn off notifications.

- Prevent distracting pop-ups from appearing on screen. They are designed to disrupt your attention. If you are screen sharing, you do not want others to see these notifications while you are presenting your monthly report on the status of FM projects.

Avoid multitasking.

- It is tempting to respond to emails or text messages while on a virtual meeting. Avoid doing this. Anything you do unrelated to the meeting prevents you from fully participating and understanding the content. Focus on what is being said, as if you were meeting in person.

Global Meeting Considerations

Conducting global meetings presents unique challenges, such as different levels of language proficiency and multiple international time zones. The following example provides a typical scenario with which a facility manager in a global organization might deal.

Example:

A multinational organization with headquarters in New York has operations in Hong Kong and Dubai. When it is 10 AM in New York, it is 6 PM in Dubai and 10 PM in Hong Kong; all on the same day. The organization holds virtual weekly meetings, with people attending from each location. Depending on when the meetings are scheduled to take place, some staff must be available in the middle of the night.

Keeping the lines of communication flowing during a meeting across international time zones requires participants to believe they are part of the same virtual team. Technology-enabled communication tools help, but other practices can make global meetings effective. Discussion of these tools follows.

Implementing a rotating schedule for meetings also called "share the pain" or "inconvenience everybody equally", distributes the time zone burden to all locations where attendees are.

Cross-cultural meeting effectiveness can also be enhanced by:

- Distributing an agenda ahead of time to allow participants to read and become familiar with meeting objectives and topics.
- Asking each meeting participant to be on the phone separately. This eliminates colleagues located in the same place from having side conversations during a meeting. This dynamic requires everyone to focus on their words and put expression in their voice, not their face.

Running a global meeting in this manner not only optimizes Web and phone-conferencing tools; it also gives all participants a meaningful voice in the meeting.

Additional aspects of cross-cultural communication are discussed in Chapter 1.

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Lesson 3: Making a Presentation

This lesson focuses on these subjects:

- Preparing for the presentation
- Structuring the presentation
- Delivering the presentation

Introduction

This topic provides guidelines for preparing and structuring presentation and delivering the message effectively to the interested stakeholders.

A presentation is a verbal report of information given in person to one or more people. By giving the presentation, there is an immediate opportunity to gather feedback and ask for a decision.

If a presentation is warranted, the form and substance may vary. Before making any presentation, determine whether there might be a more appropriate method of communication. A presentation may be a formal speech with or without visuals and handouts. Alternately, it might be a "30-second elevator pitch" aimed at generating excitement or capturing the attention of individuals to make them interested enough to request more information.

The central purpose of any presentation is communication. An effective presentation involves more than good delivery. It involves developing a strategy to fit the audience and purpose, to have good content and to organize material effectively. The rest of this lesson discusses this strategy, which applies to in-person and virtual presentations.

Preparing for the Presentation

The steps required to prepare an effective presentation parallel those followed to write an effective document. As with a document, determine the purpose of the presentation and analyze the audience. Next, gather information and facts and organize them to support the perspective or proposal.

Presentations differ from written documents in that they are intended for listeners. Your manner of delivery and your supporting visuals require as much attention as your content does. Additional discussion on this topic is found later in this lesson under Delivering the Presentation.

Determining the Purpose

Every presentation has a purpose, even if it only to share information. Use the following question as a guide to determine the primary purpose of the presentation.

- What do I want the audience to know, to believe, or to do when I finish my presentation?

Based on your answer, write a purpose statement to address the "what" and "why" questions.

Example:

The purpose of my presentation is to convince the board of the need to redesign the lobby so it is modern and inviting to anyone entering the building.

Facility management presentations have three purposes:

- To inform or teach the audience something unknown to them.
- Examples:
- To announce a new concierge service.
- To explain different types of leases.
- The objective is to communicate the information as clearly as possible, while making the presentation interesting to maintain audience attention.
- To discuss a topic or obtain input without a decision.

Examples:

- To communicate budget information and solicit feedback.
- To request input during a focus group about facility amenities.
- To persuade through sound evidence and reasoning about a topic.

Examples:

- To secure approval of a plan.
- To stress the importance of following building evacuation procedures.
- To explore differences in cross-cultural operations and explore how two parties can work together for mutual benefit.
- A persuasive presentation includes information about how the audience should feel toward the evidence and reasoning provided about the topic. The main purpose is to convince the audience to do something because of the presentation. Typical objectives are to obtain a favorable vote or decision, to reinforce existing attitudes, or to change behavior or attitudes.

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- You may use your own credibility to convince the audience to do something. Alternately, you may appeal to logic or emotions.

Analyzing the Audience

After determining the desired result of the presentation, analyze the audience to tailor the presentation to their needs. Ask the following questions about the audience:

- Who are the people in the audience?
- What is the audience's level of experience or knowledge about the topic?
- How does the presentation topic relate to them?
- What does the audience expect from the presentation?
- What more do they need to understand about the topic?
- What is the general educational level of your audience?
- What is the audience's attitude toward the topic? Based on that attitude, what concerns, fears or objections might they have?
- What questions might they ask about this topic?
- What should the audience take away from the presentation?

Understanding basic demographic information about the audience is important. For example, are there gender, cultural or educational factors to consider? Demographic factors shape what is said and how it is said, the information covered and the examples given. Present information, so it is relevant to men and women. Ethnicity, education and other demographics can also be considered.

It is an advantage to learn whether key decision makers will be in a mixed audience. Do not focus content solely on a decision maker to the exclusion of other audience members, but do target some of the remarks to them.

When presenting the same content to different audiences, assess how to tailor the presentation to increase audience receptivity to the message. The following two examples illustrate this.

Example:

Speaking about a new construction project to an audience of engineers is vastly different from presenting the content to a city council. You adapt the content differently for local community activist groups and make further variations for those activists depending on their position about the project.

Example:

When making a presentation to a multicultural audience, adjust the message to accommodate any significant cultural variations. Consideration should be given to nonverbal communication and time sensitivities.

Gathering Information

The next step in preparing the presentation is to find the facts and arguments to support the perspective or proposal.

Deciding on presentation content can be challenging. Apply the following key message composition principles discussed earlier in the course:

- Define the key message to support the presentation purpose and objectives.
- Stay on the message and develop the information, facts and arguments to support the message.

When gathering information, ask the following questions:

- Is the content appropriate for the audience?
- Will the information achieve the outcome you desire?
- Are there any unnecessary details to eliminate?
- How is the content helping you with anticipating and answering questions the audience may have?
- How has the presentation content helped to neutralize any objections the audience may have?

Remember to give the audience only what helps accomplish the goals. Too much detail might overwhelm the audience. Too little information might not adequately inform the listeners or support your recommendations.

In addition, keep in mind the caution about humor discussed previously. It can be risky to include cartoons or make attempts at humor. Poorly handled jokes and humor in a presentation can damage or destroy credibility and undermine the message.

Structuring the Presentation

Focus on the audience your presentation is structured for. Listeners are freshest at the beginning of the presentation and refocus their attention near the end. Take advantage of this pattern.

Everything said, shown and done must support the presentation's purpose. These concepts help achieve the objective. Organizing a presentation combines clear thinking and clear communication. A well-organized presentation sets the stage for the desired outcomes and action items. The audience benefits from a well-organized presentation; they gain a clear understanding of the subject and remember more about what is said.

Like other business communication media, an effective presentation consists of three parts: the introduction, the body and the conclusion. Begin with a brief overview of the topic. Use the body to develop the ideas. End your presentation with a summary of what was covered; give a call to action, if appropriate to the presentation's purpose. The balance of this section discusses these three parts and provides tips and techniques for designing them.

Refer to Chapter 2, Business Writing, for additional discussion on organizing the beginning, middle and ending of your content. In addition, see Lesson 7, Writing Business Reports, in Chapter 3 for additional discussion on composing the front material, the body and the back material of a report.

- **The Introduction**

  Capture the audience's attention.

  - Ask a question.
  - State an unusual fact related to the topic.
  - Pay the audience a professional compliment.
  - Give an illustration or example.
  - Tell a story related to the topic.
  - Use a quotation related to the topic.

  Establish what's in it for them (WIIFT).

  - Explain the benefit they gain from understanding the subject as it relates to FM. For example, inform them about something or provide facts to make an informed decision.

  Establish your credibility.

  - Convey why you are qualified to make the presentation.
  - Talk about the knowledge, skills and experiences you have related to the subject.

  Preview the subject.

  - Convey the presentation objectives.
  - Show an agenda.
  - Mention any presentation handouts you plan to distribute at the end.

- **The Body -** If the goal is to persuade, present evidence to convince the audience to agree with your conclusions and to act on them. If the goal is to discuss a problem, demonstrate it exists and offer a solution or range of possible solutions. The following tips and techniques help accomplish these goals.

  Provide relevant information. As stated earlier in this chapter:

  - Support the presentation purpose and objectives only with relevant information.
  - Eliminate anything that is unnecessary.

  Add interest.

  - Include examples, quotations and definitions.
  - Compare and contrast points.
  - Provide statistics or expert testimony to support important points.
  - Use visuals as needed.
  - Show an applicable media clip.
  - Maintain personal energy and eye contact.

  Involve the audience.

  - Allow time for a question-and-answer session.
  - Invite the audience to guess the answers to questions before you reveal them.
  - Let audience members share stories of their related experiences.

- **The Conclusion -** The closing brings the presentation full circle and asks the audience to fulfill the purpose of the presentation. The closing is what your audience is most likely to remember, use this time reiterate the goals and to be strong and persuasive. If the purpose is to motivate the listeners to action, ask them to do what you want them to do. If the purpose is to get the audience to think about something, summarize what you want them to think about.

- **Transitions -** A transition is a sentence or two to let the audience know you are moving from one topic to the next. It also prevents a choppy presentation and provides the audience with assurance that you know where you are going with communicating the topic. The following example illustrates this.

Example:

- Before getting into the specifics of each sprinkler irrigation system I compared, I want to present the general benefits of an automatic sprinkler system. This information provides you with the background you need to compare the differences among the systems and their capabilities discussed in this presentation.
- Planned transitions should occur between the introduction and the body. They should also occur between major points in the body, and between the body and the conclusion. It is also a good idea to pause for a moment after you deliver a transition between topics to let your listeners shift to the next topic.

Using Visual Aids

Including images with text is a common practice in presentations. Well-planned visuals not only add interest and emphasis to the presentation, but they also clarify and simplify the message. Charts, graphs and illustrations increase audience understanding and retention of information. This is especially true for complex issues and technical information, which could be misunderstood or overlooked without visual aids.

Use software, such as Microsoft PowerPoint, Canva and Google Slides, to create the presentation. Develop charts and graphs with data from spreadsheet software or locate visuals on the Internet, then import the files into your presentation. These software applications also offer standard templates and other features to help design effective visuals and integrated text.

Good presentation visuals:

- Give a presentation a professional image.
- Help capture and hold audience attention.
- Enhance audience understanding and retention of the presentation content.
- Increase two-way interaction with the audience.

Unprofessional or poorly designed visuals detract from a presentation. Discussion of guidelines to help with designing professional visuals follows.

Tips and Techniques for Designing Effective Visual Aids

- Do not make the visual aids the focus of the presentation. Use them to support key messages.
- Use text sparingly in visuals. Use bulleted or numbered lists, keep them in parallel structure and with balanced content. Use numbers if the sequence is important and bullets if the sequence is not important.
- Limit the number of bulleted or numbered items to no more than five or six per visual.
- Make your visuals legible and consistent in font style, size and spacing.
- Make titles and subtitles clear.
    - Limit the title of a visual to one line.
    - Limit subtitles to two lines.
- Use a font size visible from a distance. Use the following font size guidelines. **Note**: These are measurements of the font on your computer screen, not projected on a screen for an audience in full-screen mode.
    - 40 point for title size
    - 32 point for subtitles or bullet points

      Try to keep content text 24 point or larger. Smaller fonts (10-14 point) are acceptable for footers.
- Use graphs and charts to show data trends. Use only one or two illustrations per visual to avoid clutter and confusion.
- Avoid using sound or visual effects presentation software that tend to undermine the professionalism of the presentation and distract from the content.
- Be careful with animation. Overuse can be distracting. In addition, presentation software may not support the animations selected.
- Make the contrast between text and the background sharp. Use light backgrounds with dark lettering. Avoid textured or decorated backgrounds.
- Use no more than 12 visuals per presentation. Any more will challenge the audience's concentration.
- Match the delivery of the content to the visuals. Do not put a visual on the screen and talk about the previous or next visual.
- Do not read the text on your visual verbatim. The listeners look to you to provide the key points in detail.

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- Provide credit for any visual you did not create and took from another source. Include the credit either in the footer on the individual visual or in a list of references distributed to the audience.

Delivering the Presentation

After outlining and drafting the presentation, and preparing the visuals, practice. This is important for the following reasons:

- To alleviate stage fright. If you have stage fright, practice can help to calm your nerves. The more familiar you are with your content, the easier it becomes to project enthusiasm and confidence. In turn, this helps establish rapport with the audience. Practice also helps to overcome shyness and nervousness.
- To adhere to the allotted timeframe. Practice helps you stay within the allotted timeframe.
- To make final changes. Speaking the words out loud exposes flaws that reading does not. Practice allows you to discover awkward phrases you did not notice when writing and editing. It also allows you to gauge your energy level, to confirm the points to emphasize, etc.

Practice Methods

Most people dread public speaking. They experience some degree of nervousness before a presentation. If you are one of these people, focus on channeling your nervousness into being a helpful stimulant. Practice helps. The best way to master anxiety is to know the topic thoroughly. This means knowing what you are going to say and how you are going to say it. As a result, you gain confidence and reduce anxiety as you become involved in your topic.

Familiarize yourself with the sequence of the material in your outline. Once you feel comfortable, you are ready to practice the presentation.

If presenting in person, try to practice in the room where you are to give the presentation. This helps get the feel of things, such as:

- The lighting.
- The arrangement of the room.
- The position of outlets and switches.

Practice out loud to gauge the length of the presentation and to do the following:

- To uncover problems such as awkward transitions.

- To eliminate verbal tics such as "um," "you know" and "like".

Integrate the visuals into the practice sessions to help the presentation progress more smoothly. Operate the equipment until you are comfortable with it. Even if things go wrong, being prepared and practiced gives you confidence and poise to continue.

Delivery Techniques

Your delivery is audible and visual. In addition to the words and message, your nonverbal communication affects the audience.

Be animated. Your words have impact and staying power when you deliver them with physical and vocal animation. If you want listeners to share your perspective, show enthusiasm for the topic.

Discussion of the most common delivery techniques follows.

- **Eye Contact -** The best way to establish rapport with the audience is through eye contact. In a large audience, address directly those people in different parts of the room who seem most responsive. This helps you establish rapport with your listeners by holding their attention. It gives you important visual cues to let you know people are receiving the message.

  If the listeners do not seem engaged or do not seem to be listening actively, adjust the pace of your presentation.

- **Movement -** Animate the presentation with physical movement, if possible. Take a step or two to one side after you have been talking for a minute or so. This is most effective at transitional points in your presentation.

  Try not to pace. Too much movement is distracting.

  Another way to integrate movement into the presentation is to walk to the screen and point to the visual as you discuss it. Then, turn back to the audience before beginning to speak.

- **Gestures -** animate your presentation and help communicate the message. Most people gesture naturally when they talk. Nervousness can inhibit gesturing during a presentation. Keep one hand free and use it to gesture.

- **Voice -** helps communicate sincerity, enthusiasm and command of the topic. Use it to your advantage to project your credibility.

  A conversational delivery voice and eye contact promote the feeling among your listeners of addressing them directly.

  Use vocal inflection to highlight differences between key and subordinate points in the presentation.

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- **Projection -** Most presenters think they are speaking louder than they are. The presentation is ineffective for anyone in the audience who cannot hear you. If listeners must strain to hear, they may stop trying to follow.

  Correct projection issues by practicing out loud with someone listening from the back of the room.
- **Pace -** Be aware of the speed at which you deliver the presentation. If you speak too fast, your words run together and make it difficult for your audience to follow. If you speak too slowly, your listeners become impatient and distracted.

These delivery techniques apply to in-person and virtual presentations. As stated, they help you to feel more at ease as you present to the audience. They also help you to adhere to the allotted time and to find areas of your content that require revision.

What Would You Do in This Situation?

You are conducting a virtual meeting with global attendees for the first time. You have conducted meetings, but not with a diverse audience. There is little time to prepare. What steps might you take to learn as much as possible about the attendees' cultures?

Chapter Summary

Congratulations! You completed Chapter 4 of IFMA's Communications Course.

This chapter focused on helping you prepare and conduct effective meetings, whether in person or virtually. The learning objectives were to:

- Define the basic types of meetings.
- Define the purpose of a meeting.
- Apply the techniques for planning a meeting.
- Conduct a meeting, whether in person or virtually.
- Apply global considerations to a scheduled meeting.
- Prepare a presentation, whether in-person or virtual.

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Chapter 4: Progress Check

1. What is the purpose of a problem-solving meeting?

   a. To deal with a specific goal.
   b. To share updates on latest projects.
   c. To discuss important decisions.
   d. To share new ideas for improvement.

2. What is a meeting agenda?

   a. A list of supplies for the meeting.
   b. An invitation with date and time only.
   c. A clear list of items to be discussed.
   d. A list of tasks to do after the meeting.

3. What is the best reason for conducting a virtual meeting? Select all answers that apply.

   a. When the FM team is in multiple locations.
   b. When it is time to deal with a specific goal.
   c. When employees are working from home.
   d. When stakeholders are in different locations.

4. Visual aids distract an audience and should be used sparingly.

   a. True.
   b. False.

Chapter 5: Facility Management Communication Plan

Lessons

- Objectives
- Lesson 1: Meeting Stakeholder Expectations
- Lesson 2: Selecting Situation-Appropriate Media
- Lesson 3: Developing an FM Communication Plan
- Lesson 4: Communicating During a Crisis
- Lesson 5: Evaluating a Communication Plan

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Objectives

Chapter 5: Objectives

On completion of this chapter, you will be able to:

- Understand stakeholder expectations related to a project, task or issue.
- Identify what is necessary to communicate with stakeholders to keep them apprised of project, task, or issue status.
- Communicate with stakeholders to keep them apprised of project, task or issue status.
- Determine the appropriate medium for communicating with a stakeholder group.
- Develop a facility management communication plan.
- Determine what must be communicated during a crisis.
- Understand the importance of repeating a message and maintaining consistency across communication techniques used.

This chapter focuses on creating an effective facility management communication plan. FM communication plans address situations such as the following:

- Emergency event driven alerts: Imminent or happening now
- Short term: Sidewalk closure
- Midterm: Office suite renovation project
- Long term and strategic: Total landscape redesign

A proactive and comprehensive FM communication plan should include and support the organization's mission, vision, and goals.

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Lesson 1: Meeting Stakeholder Expectations

This lesson focuses on these subjects:

- Common stakeholder expectations
- Managing stakeholder expectations

Introduction

This lesson examines who facility management **stakeholders** are and the importance of understanding and addressing stakeholder concerns and expectations.

One of the most important aspects of facility management is to do what is necessary to develop and maintain positive relationships with stakeholders. Stakeholder relationship management, as defined by IFMA, is "the process of developing and maintaining communication with relevant stakeholders; and developing and maintaining an understanding of their needs, objectives, character, and constraints so that long-term, mutual beneficial solutions can be created for all parties."

An organization is more effective when it understands, manages and satisfies stakeholder needs and expectations. This lesson focuses on identifying stakeholders and their needs. It also provides tips and techniques for managing their expectations.

IFMA and the ISO 41000 series describe a stakeholder as a person or organization that affects, is affected by, or perceives itself as affected by a decision or activity. The ISO series defines a demand organization as an entity with a need and has the authority to incur costs to have requirements met. Typically, there is an authorized representative within a functional unit of the organization to manage meeting these requirements. As facility manager, you serve as the authorized representative for the facility management function. You strive to understand and solve stakeholder needs and requirements as they relate to FM.

Typical stakeholders to the organization include investors, employees, customers, suppliers, communities, governments or trade associations. These entities can be actively involved in a project. For this discussion, projects, tasks, activities and issues may be used together or interchangeably. A stakeholder can affect or be affected by the organization's objectives, operations, actions and performance.

In general, the process of managing stakeholders involves communicating with them, gathering feedback from them, and addressing their expectations and concerns. This results in meeting stakeholder needs, addressing issues, resolving conflicts, and achieving project goals.

Common Stakeholder Expectations

Being able to manage stakeholder expectations is a critical part of FM communication. Meeting stakeholder expectations requires formal and informal communication, influencing skills and relationship building.

To meet stakeholders' expectations, FM staff and you as facility manager must:

- Understand their needs.
- Build a solid relationship with them.
- Know how to communicate effectively with them.
- Be reliable.

Discussion of each element follows.

- **Understanding Stakeholder Needs -** The project, task or issue solution should meet all the stakeholders' important needs. Understanding the stakeholders' needs is the foundation on which cooperation is built. The facility manager must understand not only what each stakeholder needs, but also understand as much as possible what drives these needs. It is beneficial to document them to verify the understanding of stakeholder needs and the expected outcomes.

  The following list provides examples of activities that can impact stakeholders and their needs. Effective communication from FM staff ensures the affected stakeholders are aware of the status.

  - Annual facility management budgets determine what occupant services the FM function provides and how quickly issues are addressed.
  - Scheduled building maintenance may result in building systems being offline for testing.
  - Inclement weather may affect access to and from the facility.

  Alternately, an emergency like spillage of hazardous waste may require someone from Public Relations or Marketing to communicate with stakeholders, even though FM is actively managing the incident.

- **Maintaining Strong Relationships** - Stakeholder relations are dynamic. It is important to understand the stakeholder's perspective. Talking directly to them about the issue is crucial because it helps with building a strong relationship. Collaboration and cooperation are key factors in building trust with stakeholders. The more trust is developed, the more easily issues can be resolved.

It is also important to engage the stakeholders with the project on a scheduled basis and so they are aware of the current status. For instance, present your findings or recommendations so you leave room for the stakeholders to feel part of the decision-making process. In this way, it is likely they remember the overall experience as positive, which increases stakeholder support and project completion as you anticipate.

- **Maintaining Regular and Effective Communications -** The importance of good communication is significant. Stakeholders tend to become frustrated when their emails or voicemails are not answered, especially when dealing with time sensitive issues. Taking time to keep them apprised of an issue's status continues the relationship building. It is better to indicate to the stakeholder the reason for delay than not to respond at all. Otherwise, the stakeholder may think the message did not transmit correctly to you, the issue is not important to you, or you are unreliable.

  It is beneficial to identify the most appropriate communication medium and timing for each person. This is vital when dealing with stakeholders located globally. Lesson 2 continues the discussion on situation appropriate media selection.

- **Demonstrating Reliability -** Proving the FM function is reliable helps to build a long-term positive relationship with stakeholders. It is not only updating stakeholders about the status of an issue, but it is also about demonstrating your availability to them. Being reliable involves actions such as punctuality, prompt delivery of service, frequent engagement, etc.

Managing Stakeholder Expectations

An **effective stakeholder management** process guarantees providing timely and relevant feedback to stakeholders according to the strategy developed as facility manager. Within the strategy, do the following:

- Identify stakeholders.
- Understand stakeholder roles in the process.
- Identify their expectations relative to other stakeholders.
- Confirm common stakeholder expectations, as discussed previously.
- Resolve conflicting stakeholder expectations.

Identifying stakeholder expectations is important for reasons such as:

- The situation may look quite different when viewed from different stakeholder perspectives.
- Different stakeholders might have different expectations.

- A successful outcome may be at risk if stakeholders feel their expectations and priorities have been ignored.

By successfully managing stakeholder expectations, you are better able to align FM projects with the needs of the various groups affected. This section discusses ways to keep stakeholders reassured throughout the life of a project, task, or issue.

- Identify Who the Stakeholders Are:

  Most projects, tasks or issues have multiple stakeholder groups, some of which may not be easily recognizable. Identify obvious stakeholders as well as the non-obvious, quiet stakeholders as soon as possible. If you fail to consider the expectations of non-obvious stakeholders, you might lose important influencers.

  IFMA defines categories of stakeholders as follows:

  Key (critical) stakeholder

  - Business owners, board members, organizational executives, customers and regulators.

  Primary stakeholder

  - An individual or group closely linked with an aspect or phase of the master plan or asset life cycle.

  Secondary stakeholder

  - An individual or interest group with indirect connection to the matter being addressed.

  Additionally, a primary stakeholder is one who is part of a project, task or issue for its duration. Although the stakeholder's information needs, inputs and decisions vary over time, the goal is focused on achieving a successful outcome. Secondary stakeholders have shorter involvement limited to aspects of the project, task or issue. Their roles consist of either completing function-specific activities for example, legal, marketing or human resources or technical activities, contractor, supplier or application-specific.

  The stakeholder has interests which may affect the performance or completion of the project, task or issue. In addition, the stakeholder may exert influence over performance or completion. Identify which stakeholders are advocates and which are not. Then, map the strategy accordingly.

  Problems arise when each stakeholder group has conflicting interests. Most organizations have insufficient resources to satisfy each group. Decisions must be made on how much priority to give each group's needs and expectations.

  To be clear about their expectations, ask the stakeholders. Soliciting feedback is a critical component of managing stakeholder expectations. Stakeholder feedback helps you as facility manager to understand:

- Identify Preferred Communication Method

  Effective stakeholder management also means communicating with your stakeholders and understanding not all stakeholder groups require the same information at the same time. Therefore, it is beneficial to classify the level of communication needed for each stakeholder. For instance, determine the following:

  - Who insists on receiving all details?
  - Who wants daily or weekly status reports?
  - Who prefers occasional overviews?

  Effective stakeholder management also means communicating with the stakeholders and understanding not all stakeholder groups require the same information at the same time. It is beneficial to classify the level of communication needed for each stakeholder. For instance, determine the following:

  Tips for communicating effectively with stakeholders follow.

  - Identify the intended recipients of the communication, recognizing different stakeholders might require different information, and in different forms.
  - Identify the issues of concern to each stakeholder, particularly concerns related to decisions each stakeholder must make.
  - Determine which information should be communicated based on the specific information requirements of each stakeholder.
  - Select a communication approach that works most effectively with each stakeholder.

  Ultimately, the goal is to keep stakeholders engaged throughout the process with timely updates by using the most effective manner of communication to ensure they are informed. If you use the non-preferred method, it could cause frustration and lack of confidence, or show you failed to listen to the initial direction. Lesson 2, Selecting Situation-Appropriate Media, provides tips and techniques for communicating with stakeholders. In addition, Chapter 6, Facility Management Communication Plan, discusses creating a plan designed to communicate status to stakeholders.

- Solicit Feedback

  To be clear about their expectations, ask the stakeholders. Soliciting feedback is a critical component of managing stakeholder expectations. Stakeholder feedback helps you as facility manager to understand:

  - Who needs the information?
  - What kind of information is needed?
  - How much information is required and at what level of detail?

- How should the information be formatted and presented?
- How quickly must the information be distributed?

Answers to these questions help you provide the right information in the right format at the right time. The result is FM messages and communication plans will fulfill stakeholder expectations.

Lesson 2: Selecting Situation-Appropriate Media

This lesson focuses on these subjects:

- Stakeholder preferences
- Media advantages and disadvantages

Introduction

This lesson discusses stakeholder media preferences. In addition, the advantages and disadvantages of selecting various types of media is included.

As stated, facility managers communicate with various stakeholders. An important part of communicating with them is to select situation-appropriate media. This helps ensure the media selected:

- Is best suited for possible message permanency and whether people need to be able to refer to the message periodically.
- Support the level of detail in the message.
- Support the message design for example, text, graphics, color, symbols, or links to supporting documents.
- Support the need for privacy and confidentiality.

Stakeholders and Media Preferences

As stated in Lesson 1, Meeting Stakeholder Expectations, FM stakeholders have specific needs for information. Any communication medium chosen reflects why a stakeholder needs the information. It also accommodates what the stakeholder plans to do with it.

The media selected should be suited to the level of urgency as it relates to the following two aspects:

- The urgency of the need to communicate the information.
- The urgency of the information itself.

Consider communicating to stakeholders in proportion to the importance of what is at stake concerning achieving a successful outcome for a project, task or issue.

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Media Advantages and Disadvantages

An effective communication plan uses various types of media to keep FM stakeholders apprised of what is happening. An FM communication plan serves as a guiding map for internal and external communication. Chapter 6, Facility Management Communication Plan, explains how to create an effective communication plan.

Stakeholder expectations and other situation specifics determine the communication issues to be addressed and what methods of communication to use. This section discusses a few media types, their target audience, and their advantages and disadvantages. Each discussion includes an example of how to use the media type.

- Email

  Target Audience:

  - All stakeholders

  Example:

  - An e-mail sent to employees reminding them of an all-employee meeting pertaining to the move.

  Advantages:

  - Allows for widespread distribution.
  - Enables establishment of links to other sites.
  - Creates pages on existing sites.

  Disadvantages:

  - Requires someone to manage websites, and provide technical assistance.

- Face-to-Face Presentations and Meetings

  Target Audience:

  - Specific stakeholders impacted by the project, task, issue or activity.

  Example:

  - Routine status meetings with department coordinators or departments as needed.

  Advantages:

  - Promotes potential for interaction and participation.

  Disadvantages:

  - Requires advance scheduling.
  - Is time-consuming to set up and conduct.

- Fact Sheets and Flyers

  Target Audience:

  - All stakeholders
  - Targeted stakeholders impacted by the project, task, issue or activity.

  Example:

  - Directions and a map to a new location.

  Advantages

  - Creates potential for wide distribution.
  - Is inexpensive to produce.

  Disadvantages:

  - Hinders potential for feedback.
  - Limits distributed information to specific topic.

- Interactive Media

  (Teleconferencing, Video Conferencing, Virtual Meetings, Webinars)

  Target Audience:

  - Specific stakeholders impacted by the project, task, issue or activity.

  Example:

  - A video conference call with the move management team, department heads and department coordinators to share screen shots of floor plans.

  Advantages:

  - Creates a global reach.

  Disadvantages:

  - Creates some hardware and software requirements.
  - May need support from print materials.

- Internet/Intranet Broadcasts

  (Podcasts, Streaming Media, Webcasts)

  Target Audience:

  - Specific stakeholders impacted by the project, task, issue, or activity.

  Example:

  - A podcast to introduce the features of a new phone system.

Advantages:

- Creates a global reach.

Disadvantages:

- Creates some hardware and software requirements.

- Mobile Devices and Text Messages

  Target audience

  - Specific stakeholders impacted by the project, task, issue or activity.

  Example:

  - A text message announcing the welcome desk in a new location is open.

  Advantages:

  - Is low cost
  - Is popular

  Disadvantages:

  - Requires cell phone numbers.
  - Restricts message length.
  - Is best used with other communication efforts.

- Newsletters

  Target Audience:

  - All stakeholders
  - Targeted stakeholders impacted by the project, task, issue or activity.

  Example:

  - A newsletter to keep employees updated on a major relocation, including construction progress, planned food service options, facts related to rumors, calendar of events, new technology highlights and other information as needed.

  Advantages:

  - Is good for reporting achievements, events, or progress.
  - Can deliver electronically or in print.
  - Can include links.
  - Is reasonable in cost to produce.

Disadvantages:

- Requires visual and written literacy to produce.
- Can be labor intensive and time consuming to organize.

- Posters

  Target Audience:

  - All stakeholders
  - Targeted stakeholders impacted by the project, task, issue or activity.

  Advantages:

  - Can deliver simple messages or slogans.
  - Displays visuals.
  - Is reasonable in cost to produce.

  Disadvantages:

  - Hinders potential for feedback without including contact information or QR code.
  - Requires visual and written literacy to produce.

- Social Media

  Target Audience:

  - All stakeholders
  - Targeted stakeholders impacted by the project, task, issue or activity.

  Example:

  - A social media campaign designed to generate buzz about restaurants and other services available in a new location.

  Advantages:

  - Creates a global.

  Disadvantages:

  - Produces need to understand which channels to use.

- Town Hall Meetings

  Target Audience:

  - Specific stakeholders impacted by the project, task, issue or activity.

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Example:

- A town hall meeting where executives address the state of organizational affairs and the growth need for new construction, including a moderated question-and-answer session.

Advantages:

- Creates a global reach through virtual meetings.
- Holds audience's attention better than other forms of communication.
- Builds trust and credibility for the presenter and the topic.
- Allows the audience to ask questions and express opinions.

Disadvantages:

- Can be time consuming and expensive to organize.
- Requires careful venue selection.
- May result in distrust if meetings are not conducted in that the audience sees presenters as respectful, believable, and honest.
- Can lead to cynicism if promises to act and follow up are not kept.

• Websites/Internet/Blogs/Instant Messages

Target Audience:

- All stakeholders
- Listservs (automatic electronic mailing lists) to target specific stakeholders impacted by the project, task, issue or activity.

Example:

- Pages on a website devoted to relocation updates.

Advantages:

- Allows for widespread distribution.
- Enables establishment of links to other sites.
- Creates pages on existing sites.
- Creates potential for interaction through blogs and instant messaging.

Disadvantages:

- Requires someone to manage listservs and websites provide technical assistance.

Lesson 3: Developing an FM Communication Plan

This lesson focuses on these subjects:

- The importance of repetition and consistency
- Evolution of a communication plan

Introduction

This lesson provides guidelines for creating an effective **facility management communication plan**.

A facility management communication plan takes on different forms, such as:

- A comprehensive strategic plan to communicate FM mission and goals to stakeholders.
- A tactical project plan designed to communicate the status of a project, task, activity, or issue.

Many techniques can be used to communicate a plan. The plan can be delivered verbally, written, or digitally. The specific technique depends on factors like:

- The purpose and objectives of the communication.
- The stakeholder profiles.
- The advantages and disadvantages of each communication technique.
- The funds available.

Although each communication plan is unique, each contains common aspects to make it effective. An effective communication:

- Addresses which stakeholders to target.
- Defines the purpose of the communication with each stakeholder group.
- Identifies primary and supporting media to be used to deliver the messages.
- Specifies the timing and frequency of the communication.
- Identifies who ensures messages are created and distributed according to the plan.
- Indicates how the plan's effectiveness will be judged.

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The Importance of Repetition and Consistency

Organizations may hire a communication consultant or enlist the services of their internal public relations department to help the facility manager develop and implement the FM communication plan. For instance, you must create a move management plan as illustrated in Lesson 3. You might retain the services of a facility management consultant specializing in comprehensive move management, including all coordination, communications, and connections.

Whether a facility manager expedites a communication plan internally or contracts with an external service provider, it is important to **repeat the message and maintain consistency** across all communication techniques used. Within a single communication plan, the primary and supporting media should be consistent in appearance, linguistic style, and tone (including facts, figures, slogans, etc.). Without this consistency, the messages become ineffective for the intended stakeholder audience. Furthermore, a lack of consistency may confuse or distract the audience.

The importance of repetition in getting a message across, and the absolute necessity of the FM team delivering the message consistently to their contacts, should not be underestimated. Planned repetition and consistency broaden the reach of communication, reinforce the message, and expand the opportunity for uniform understanding by the audience.

FM Communication Plan

Evolution of an FM Communication Plan

As an example of how to develop an effective communication plan, this lesson follows the creation and implementation of a move management plan. It provides a better understanding of the aspects of a communication plan.

Move Management Plan Example Part 1

A move management communication plan addresses all steps in a relocation and helps to provide business continuity. This is the case whether an organization is restacking, transitioning, right-sizing, or clearing out an old location and setting up a new location for ten people or hundreds of people. A move management plan makes it easy and ensures that the business continues to function with minimal downtime.

Move management involves tiered communications. As discussed in Lesson 1, Meeting Stakeholder Expectations, individual stakeholders have different information needs. A good move management plan informs all levels in an organization. It ensures the right people receive the right information, at the right time, and in the right format with the right emphasis. The following list illustrates this:

- Senior or executive management.
  - Communication with these stakeholders includes information on costs, budget, risks, key milestones, and status.
- Department coordinators
  - Communication with these stakeholders describes roles and responsibilities, plans, tasks, assignments, and action items, schedule, deliverables, and status.
- Employees
  - Communication with these stakeholders alleviates the concerns of employees involved in the move. It also dispels grapevine rumors. Good communication promotes an understanding of decisions made and facilitates a smooth transition. Before the move, communication updates employees on the relocation and answers as many potential questions as possible about the move. At the time of the move, communication provides specific directions about packing and labeling responsibilities. It also explains aspects of settling into the new space.

Move Management Plan Example Part 2

Consider the communication techniques used to convey information to each of the stakeholders indicated in Part 1.

- Senior or executive management
  - An initial face-to-face meeting might be used to review the scope of the move, budget, risks, and milestones, and to gain buy-in. Supporting printed or digital documents could also be distributed.
- Department coordinators
  - Following an initial kickoff meeting, regularly scheduled meetings and meetings as warranted (either face-to-face or virtual) could be used to discuss project status, review group responsibilities, coordinate schedules, etc. Emails could be sent for general communication.
- Employees
  - Planned communication through meetings, the organization's Intranet, website, email, newsletters, and other media could be used. This helps to

address concerns and rumors about personal workspace, storage space, facility amenities, schedule of events, etc.

NOTE: Lesson 2 discusses the advantages and disadvantages of various media which can be used in communication plans.

Sample Move Management Documents

The Resource Center contains examples of progressive communications intended for employees in a move management scenario. They are:

- Sample Headquarters Relocation Employee Move Guide
  - A communication distributed before the move as reference, intended to answer common questions about the move.
- Sample Headquarters Relocation Personnel Checkout Form
  - A checklist completed during packing for the move and shared with a departmental move coordinator.
- Sample Headquarters Relocation Welcome Packet
  - A communication available upon arrival (often left at the new desks) for the employees' reference that may include reporting of move-related issues, return of moving supplies, printer and voice mail setup and other relevant items.

Lesson 4: Communicating During a Crisis

This lesson focuses on these subjects:

- Creating messages
- Releasing information
- Resources for crisis communication

Introduction

This lesson provides guidelines for disseminating information during a crisis.

The need to communicate is immediate when an **emergency** or crisis occurs. An emergency is a serious, unexpected, or dangerous situation which poses an immediate risk requiring urgent attention. Examples of emergencies that could affect the facility management function are downed power lines, broken pipes causing water damage, or stalled elevators. A **crisis** is a condition of instability or danger which leads to a decisive change. Examples of crises that could affect the facility management function are disasters such as floods, hurricanes, fires, earthquakes, extended periods of high heat and humidity, or excessively cold weather. Regardless of whether an incident is an emergency or crisis, you use **crisis communication** to ensure affected stakeholders know what happened and what is being done to rectify the situation.

Crisis communication disseminates information to address an emergency or crisis impacting an organization or its stakeholders. It focuses on how you as facility manager communicate with stakeholders. Understanding the audience that the FM function needs to reach is one of the first steps in crisis communication. As with any FM-related communication, identify the affected stakeholders and determine their need for information.

Although crisis communication can be reactive in nature, it helps to have a process in place to make it easier to get information to the stakeholders. The rest of this lesson provides techniques for designing the process. This process ensures information reaches the stakeholders. It guarantees a quick release of information and a consistent message on all the organization's platforms. Additional discussion about messages follows next.

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Messages

After identifying the stakeholders, create messages to apprise them of the status of the incident. The messages depend on what the crisis involves and how stakeholders are affected by it. For instance, electrical failure within the facility causes reduced or complete loss of functionality throughout the building. This requires the facility management function to respond to stakeholders promptly, accurately and confidently during the emergency and in the hours that follow.

It is challenging to write messages during the incident, consider creating message templates in advance. Different incidents might occur, the need for communication relates more to the impacts or potential impacts of an incident. Modify the templates with information addressing a specific incident. Consider writing message templates to address incidents such as:

- Accidents injuring employees or others.
- Property damage to the facility.
- Liability-associated injury to or damage sustained by others.
- Service interruptions.
- Chemical spills or releases with potential onsite and offsite consequences, including environmental.

Three examples of message templates follow. Click the buttons below to see a sample message template.

- General Security Alert Message

  Sample General Security Alert Message Template

  - Security Alert at [organization name]
  - Shelter is in place. Lock all doors and windows and await further instructions.
  - Please check [URL]* for more information.
    - *Website to check for real-time updates about the situation; this can also be a social media handle if such an account is used to provide security updates.
  - [time of delivery]

  This template lets stakeholders know an emergency exists and assures them regarding their safety. Make this message template clear and brief so you can send it to all communication channels. Although the information is general because it is the first message sent, it should contain specific directions.

Include a time of delivery in case people see the message at a time other than when you sent it. If you send the message by email, use "Security Alert at [facility name] as the subject line. Follow this type of message with an "all clear" message once the situation is resolved.

- Severe Weather Conditions Message

  Sample Severe Weather Conditions Message Template

  - Ongoing severe weather conditions.
  - All activities will be suspended starting [time].
  - Please refer to [person in charge of emergencies] for assistance.
  - Please check [URL]* for more information.
    - *Website to check for real-time updates about the situation; this can also be a social media handle if such an account will be used to provide security updates.

  This template is one that can be sent out immediately for safety reasons. Use this template to alert people to facility closure due to weather conditions or for a natural disaster if the condition closes the facility. Include additional information such as weather reports if available at the time of message delivery.

- Structural Damage Message

  Sample Structural Damage Message Template

  - ATTENTION! Structural damage alert at [organization name] [address].
  - We have been made aware of a structural damage.
  - Please evacuate if you find yourself in the building. Otherwise, stay clear of the area.
  - Please refer to [name of person in charge] for assistance.
  - Please check [URL]* for more information.
    - *Website to check for real-time updates about the situation; this can also be a social media handle if such an account will be used to provide security updates.

Release of Information

Another important element of crisis communication is the need to coordinate the **release of information**. Initially, only limited information is available. As new information is known, the story changes. The message you disseminate must be consistent to maintain credibility and stakeholder support.

Common questions to address as you release information to the stakeholders are:

- What happened?
- Where and when?
- Who was affected?
- Who is involved?
- When did you learn about the incident?
- What is the impact or likely impact?
- Is there any immediate danger?
- Do you understand the entire issue?

Although crisis communication depends on the incident, it is beneficial to assign a spokesperson to update stakeholders on the status of the incident. Assigning one person to be the point of contact and distributor of information ensures each message is consistent while addressing questions and providing updates. Ideally, this should be the facility manager, it might be another manager if the facility manager is involved in dealing with the incident.

Resources for Crisis Communication

As facility manager, consider ensuring provisions are made to set up the following to continue communication with stakeholders:

- Telephones or cell phones for incoming calls.
- Access to any electronic notification system used to inform employees and occupants.
- Email for sending and receiving messages.
- Fax machine, if needed.
- Webmaster access to company website to post updates.
- Access to social media accounts.
- Access to a secure server and to message template library.
- Access to digital or printed copies of emergency response or business continuity plans.
- Site and building diagrams, information related to business processes and loss prevention programs (e.g., safety and health; property loss prevention; physical, information, cyber security; environmental management).
- Copiers or printers.

- Method for documenting events as they unfold.

Lesson 5: Evaluating a Communication Plan

This lesson focuses on this subject:

- Determining the effectiveness of a communication plan

Evaluating an FM Communication Plan

This lesson provides guidelines for determining whether the goal and purpose of your facility management communication plan was achieved.

As the communication plan is created, consider how to determine its effectiveness in conveying to stakeholders what they should know. This can be done through **evaluation.**

Evaluating the communication plan provides the chance to adjust and improve the communication goals, objectives and strategy. For instance, this is achieved by asking the targeted stakeholders for their feedback and suggestions. Their responses can help improve the overall facility management communication process.

Before creating a plan, it is important to have an idea of the objective or objectives you want to evaluate. The following components help you expand on this.

- State each objective in measurable terms.
- What type of information is needed to determine if an objective was attained? What barrier or barriers might prevent an objective from being attained?
- What is the source of information for example, stakeholders, documents to be gathered?
- How is information to be collected for example, interviews, surveys?
- What time frame for gathering the information?
- How is confidentiality to be maintained?
- What method is to be used to analyze the information to determine whether an objective was attained?

Another component of an evaluation plan is to design procedures for managing and monitoring the evaluation. This includes training members of the staff to collect evaluation-related information. It also entails setting timelines for collecting, analyzing and reporting information to interested stakeholders.

As stated, evaluating the communication plan provides the chance to adjust and improve your communication goals, objectives and strategy. This process can help improve the overall facility management communication function.

What Would You Do in This Situation?

Your facility and its grounds sustained extensive damage from a storm. You must activate the FM crisis communication plan. How will the FM team respond promptly, accurately, and confidently during this emergency?

Chapter Summary

Congratulations! You completed Chapter 5 of IFMA's Communications Course.

This chapter focused on managing stakeholder expectations. The learning objectives were to:

- Identify stakeholders affected by a project, task or issue.
- Evaluate stakeholder expectations related to a project, task or issue.
- Communicate with stakeholders to keep them apprised of project, task or issue status.
- Determine the appropriate medium for communicating with a stakeholder group.
- Develop a facility management communication plan.
- Determine what must be communicated during a crisis
- Use the facility management communication plan to apprise stakeholders of activity status.
- Discuss the importance of repeating a message and maintaining consistency across communication techniques used.

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Chapter 5: Progress Check

1. Why is it important to consider what is at stake when selecting appropriate media?
   a. It leads to successful outcomes.
   b. It suits the level of urgency.
   c. It serves as a guiding map.
   d. It solves conflicting expectations.

2. Crisis communication shares information to respond appropriately to a situation.
   a. True.
   b. False.

3. The best time to communicate with stakeholders is after an emergency occurs.
   a. True.
   b. False.

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Progress Check Question Answer Key

Chapter 1: Business Communication Basics

Objectives

1. b
2. a
3. d
4. d
5. a
6. b

Chapter 2: Business Writing

Objectives

1. b
2. b, d
3. a
4. b
5. a
6. b
7. a

Chapter 3: Written Business Communication to Achieve Results

Objectives

1. a, c, d
2. a
3. d
4. c
5. a, c, d

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6. d

Chapter 4: Conducting Effective Meetings

Objectives

1. a
2. c
3. a, c, d
4. b

Chapter 5: Facility Management Communication Plan

Objectives

1. b
2. a
3. b

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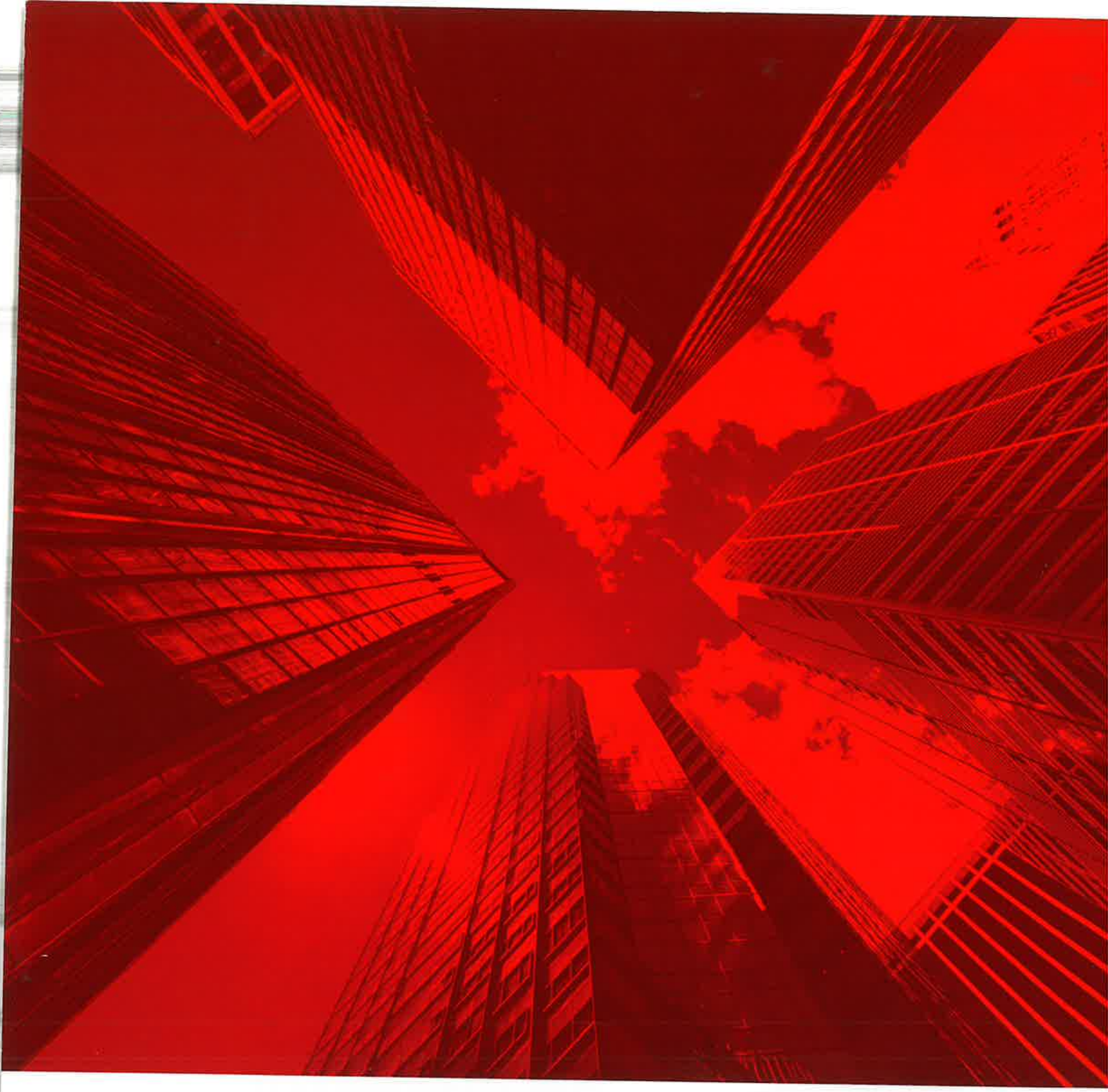

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