A NEW PERSPECTIVE
SEES THE OPPORTUNITY IN A SOLUTION
FOCUSED ON **QUALITY.**

In Greek mythology, Sisyphus was condemned by the gods to suffer the worst punishment imaginable: To spend eternity rolling a giant boulder up a steep mountain, only to have the boulder roll back down after the apex was reached — once the boulder hit bottom, the task would repeat again.

Today's knowledge workers face their own modern version of torment — we spend countless hours reacting to our inbox, attending meetings and sitting on calls. Day after day after day. It's overwhelming.

We are trapped in the thick of thin things - this book was created to help you break out.

There's little doubt that the volume of interactions has accelerated and our ability to focus has diminished. To confront the never-ending requests for our attention, we try to work faster or use tools to increase our efficiency. These approaches suffer from their focus on how much you can get done - the quantity of work you can complete.

What has been lost in our race for increased productivity is our focus on why we do our work in the first place. Value for nearly all individuals, teams or organizations is measured in quality. The value of ideas, insights and innovations - is not a measurement of how many, but rather how meaningful they are.

WHEN WE FOCUS ON QUALITY, WE MEASURE THE VALUE OF OUR CONTRIBUTION, NOT THE VOLUME.

All organizations have a communication culture - one that is typically unstated yet felt by everyone involved. When that culture is focused on volume, investments are made in tools and systems designed to facilitate interactions and track connections. Productivity is a factor of more from more.

There is a different approach. What happens in a culture focused on value? Interactions are a means to an end. Objectives supersede processes and the lens of value refocuses work away from systems and onto solutions.

We call this Streamlining.

Streamlining is a new mindset for productivity –
where fewer, high-quality interactions deliver more
results with less effort.

LET'S START ACHIEVING
MORE FROM LESS.

SAID & DONE

JASON A. FRANZEN
STEPHAN M. MARDYKS
DAVID M. R. COVEY

Simplicity is the ultimate sophistication.

- LEONARDO DA VINCI

FOREWORD

Though I've spent decades in a career exploring and teaching how to get things done with less effort, reading this book heightened my perspectives and sharpened my focus in that arena even more. And I found it particularly valuable because it applies sophisticated simplicity to how we communicate – a universal experience astoundingly rich in potential but fraught with unproductive practices.

I know the cleaner and clearer our heads are, the more creatively engaged we become in whatever we are doing. This is a very cool handbook for applying that principle to one of the most important aspects of our lives.

Though I've been writing emails since 1983, a few minutes after reading this I wrote a much better one.

David Allen
Author of *Getting Things Done*

PERSPECTIVE

"When all is said and done, more is said than done."

– AESOP

THE STORY OF MICHAEL

It was a typical Tuesday for Michael when he arrived at his desk early — excited to outline the things he needs to get done today. There are only four important items he must complete, and a fairly open day on his calendar, so he digs right in.

Michael has a few emails to respond to from the day before. A few of these were unclear so he shoots off some questions, completes what he can and empties his inbox before 9 AM. This is going to be a smooth day!

Turning his attention to the first item on his list, Michael is just getting his head around a complicated arrangement with a partner company when he receives a text from his boss — can he join her in a meeting at 3 PM this afternoon? He is happy for the invite and is quick to oblige.

As he turns back to his task, some replies to his earlier email questions start to arrive. One of his colleagues, Blair, is asking for a quick call to clear up a few items with the group instead of trying to answer by email. The call will be in 1/2 hour, not leaving Michael with enough time to finish his first project, so he shuffles his plans a bit to accommodate the call.

To kill some time ahead of the call, Michael pops onto the in-house chat platform to see what is going on. There is a spirited discussion happening about the kitchen on his floor and Michael lobs a playful suggestion about color-coded labels into the chat stream.

Turning to the team call, Michael makes small talk with his colleagues who joined on time, and they all wait for Blair. After ten minutes, the group receives an apologetic email from Blair who is stuck on another call. He needs to reschedule for 2 PM this afternoon.

It's 10:15 AM and Michael finally can dig into his first project.

Around 11 AM, Michael gets a text from his boss letting him know the 3 PM call has been moved to a lunch meeting — downtown. She knows this will be inconvenient for him, but if he can make it she will really appreciate it. Michael lets her know he'll be there and heads for the door. With traffic, he will just barely make the lunch meeting.

On the way out, Michael sends a text to his wife letting her know he won't be home for lunch as he'd planned. Two minutes later, Michael's wife calls and reminds him they needed to exchange cars at lunch so she could pick up the new dresser with his SUV. They negotiate and reshuffle their schedules with Michael planning to be at home by 4:30 PM so she can take his car.

During lunch, Michael can sense the work piling up as his phone buzzes with emails and group texts. He does his best to contribute to the lunch meeting, but the anxiety of his open tasks distract him. His boss notices.

Back from lunch, he remembers that the 2 PM call is coming up and tries to complete his first task from the morning. He nearly wraps up, but some chatter on the instant message platform about his sassy food labeling idea draws him into a trivial discussion about the cost of labeling machines.

Michael calls into the 2 PM team call that had been moved from this morning — where everyone finally joins after ten minutes of small talk. It turns out they needed to all look at a draft presentation - so they all switch to a WebEx call and are up and sharing by about 2:20 PM. A few people have to drop off at 2:30 PM and they ask for Michael to share any decisions that come from the call. Michael takes notes, watches the IM threads, and texts with his wife during the call just to try and keep up.

After the call, Michael sends out the notes and decisions made by the team, and by 3:30 PM he is able to refocus on his task list.

Emails keep arriving. Ding. Ding. Ding. The notes he sent out generate a slew of new questions and one of his team members needs the PowerPoint sent to him as a PDF since he is traveling and only has access through his phone. Twenty minutes later and Michael has wrapped up the "spontaneous meeting" from the morning!

Michael is watching the clock since he needs to be home by 4:30 PM — just as his boss calls to get his take on the lunch meeting. Michael tries to give her his full attention, but the texts, emails, IMs and his calendar all have reminders and notifications going off. The call does not go well.

He decides he is better off taking his computer home to work at night, so he packs up his bag and heads to the elevator — trying to slip out unnoticed. When the elevator arrives, he steps in, only to be greeted by the company President, Mr. Enso. The President quickly accesses the situation and quips, "Done for the day, Michael?"

"Not even close! Just going to work from home tonight, there are too many distractions here." Michael replies.

"Too many distractions, or not enough focus?" Mr. Enso rhetorically asks as the doors open and Michael steps into the parking garage. Mr. Enso does not leave the elevator.

Michael walks quickly to his car, only to realize his keys are in his jacket. Upstairs.

TOO MANY DISTRACTIONS, OR NOT ENOUGH FOCUS?

PLAYING DEFENSE

THE MORAL OF THE STORY

What we see in the preceding story of Michael and in so many of our own habits, is that the balance of work and communication has become unreasonable.

Where once we used communication to augment our work, it is no longer uncommon for communication to trump our focus on work completely.

COMMUNICATION ABOUT WORK HAS BECOME MORE IMPORTANT THAN THE WORK ITSELF.

The ever-growing collection of communication channels funneling into our consciousness; emails, texts, phone calls, instant messages, meetings, and conference calls has shifted our attitude to a reactionary (defensive) default. As a result, our effective time to work has been sliced and diced into gaps between communications.

COMMUNICATION HAS AN ENORMOUS INFLUENCE ON OUR PRODUCTIVITY.

Streamlined communication is designed to increase both efficiency and effectiveness. When we adopt the principles of streamlining, our communication allows us to spend more time playing offense instead of defense.

To better understand and apply the Streamline approach to your own work, the next section offers a two-step guide for Best Practices.

WORK

COMMUNICATION

VS

COMMUNICATION

WORK

MORE IS LESS

PRODUCTIVE

IT WASN'T ALWAYS LIKE THIS

The hyper-connected world we live in today evolved over the past 40 years in conjunction with advancements in technology. Where early tools like the fax machine made it possible to send documents in minutes instead of days, newer tools have been designed to send millions of messages in seconds all around the world.

The convenience of these tools has led to efficiencies making it possible to do more with less effort.

TECHNOLOGY HAS BEEN EMBRACED AS THE SAVIOR OF PRODUCTIVITY.

Until it isn't. Until the speed and ease of communicating and interacting is so seamless, so free of friction, that there is literally nothing stopping anyone from reaching anyone else. At anytime. Anywhere in the world.

The evolution has been constant and the speed of change has increased at exponential rates.

THE BUSINESS OF INTERACTIONS

Interactions in the workplace take a variety of forms, and technology has found ways to improve almost all of them over time.

In-person meetings > video chats
One-on-one telephone calls > global conference calls
Exchanging letters and documents > faxes & emails
Sending personal notes > texts and instant messages

Advancements in technology means it's possible to interact with more people across larger distances with less effort, year after year.

IN THE 1970S, EXECUTIVES AVERAGED AROUND 1,000 INTERACTIONS A YEAR.

THAT'S ABOUT FOUR A DAY.

SOURCE:
BAIN & COMPANY 2016

1,000
INTERACTIONS / YEAR

1970s

THE 1980s

The rise of voicemail and fax machines in the 1980s meant that business could extend beyond the work hours - more than quadrupling the typical # of interactions in a year.

THE 1990s

Email started to take hold as a critical channel for interactions – quickly doubling the number of interactions.

THE 2000s

By the mid-2000s, Email exploded and interactions more than doubled again.

THE 2010s

In recent years, the rise of virtual collaboration amongst teams spread around the country or globe has pushed the interactions past 30,000 a year.

THAT'S OVER 120 EACH DAY.

30,000
INTERACTIONS / YEAR

25,000
INTERACTIONS / YEAR

9,000
INTERACTIONS / YEAR

4,000
INTERACTIONS / YEAR

| 1980s | 1990s | 2000s | 2010s |
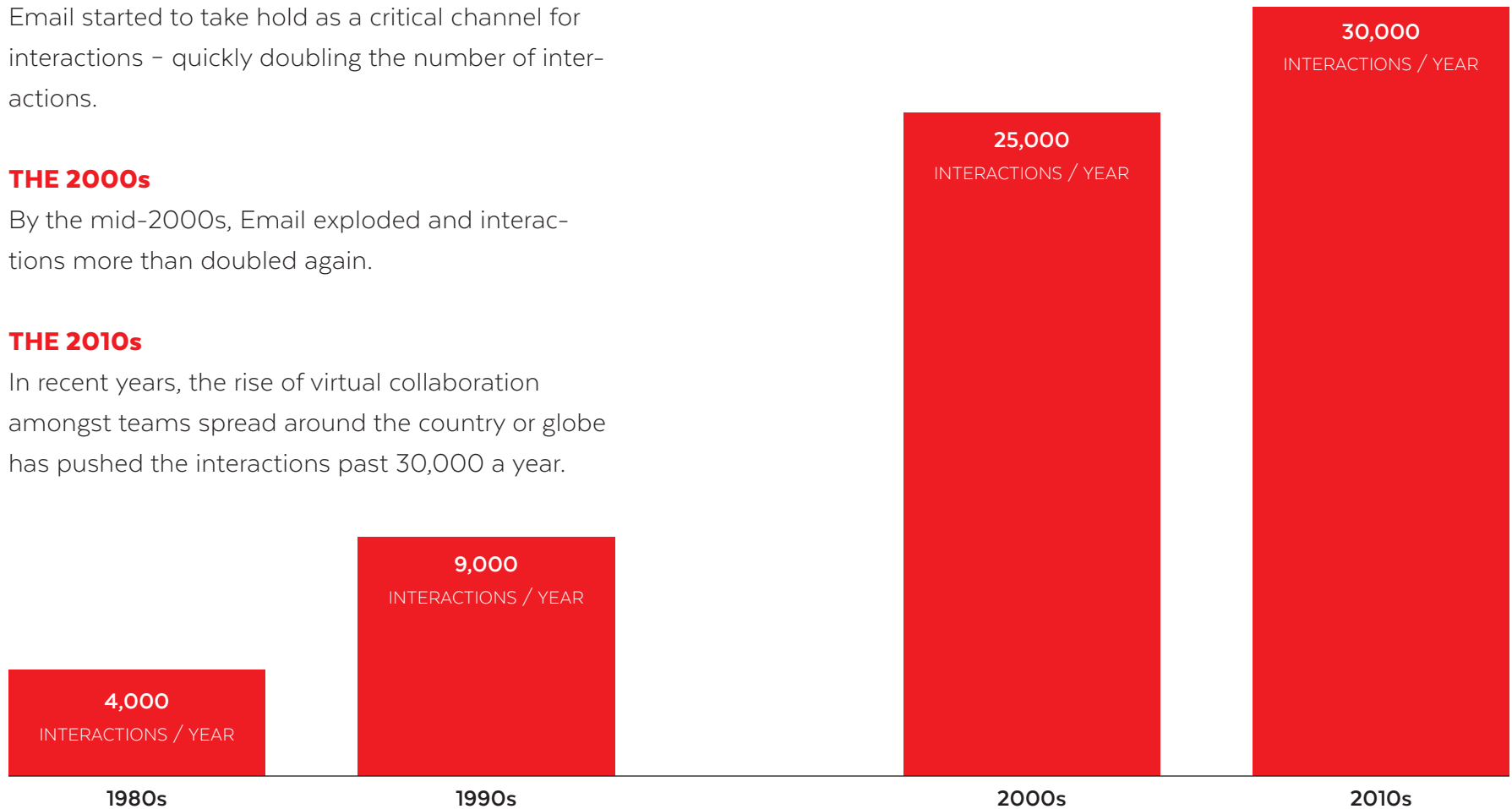
THE AGE OF DISTRACTION

In just over 40 years, we've seen interactions grow 30-fold. On their own, each innovation has offered substantial benefits in efficiency, reach and speed. But when taken together, the sheer volume of inter-actions means we have to work harder to keep up. And harder typically does not mean better.

THE PROMISE OF INCREASED PRODUCTIVITY HAS LED TO A REALITY OF CONSTANT DISTRACTION.

Between all of the calls, virtual meetings, emails and instant messages, there has become less and less time to focus on our actual work.

Where once the idea of interacting more often meant getting more done, we now find ourselves being less productive the more connected we be-come.

MORE IS LESS PRODUCTIVE.

Fortunately, there is another path we can take.

WORK IS

50%

NON-ESSENTIAL
INTERACTIONS

MORE THAN 50% OF OUR WORKDAY IS NOW SPENT IN INTERACTIONS NOT DIRECTLY ASSOCIATED WITH OUR ROLE. EMAIL ALONE ACCOUNTS FOR 28% OF MOST WORKDAYS.

WORK IS

28%

SOURCE: WORKFRONT BOOK, 2015 , the State of Enterprise Work

LESS IS MORE   EFFECTIVE

"LESS IS MORE."

Ludwig Mies van der Rohe, 1947
Architect and furniture designer describing minimalism

LESS IS MORE

In this bold statement, the world-renowned architect Mies van der Rohe made the case for achieving more impact through less decoration in modern architecture. His premise holds true for modern communication.

As the speed and intensity of communication has grown exponentially in the past decades, our attention has been divided and fragmented while messages have overlapped and become mixed together into a dense blur. The mantra has for too long been MORE and FASTER.

For communication to get our attention in today's world, it must stand out and be unique. Saying less is one of the most powerful ways to do that.

While getting attention is an important step, it is not the ultimate goal. The aim of our communication should be to make an impact — to move ideas forward through action. This is where LESS truly becomes MORE EFFECTIVE.

When we streamline our communication to focus on an essential audience, message, and action, we are creating a clear path for our ideas to reach their objective.

STREAMLINED COMMUNICATION REQUIRES LESS ENERGY TO SEND IDEAS FURTHER, FASTER.
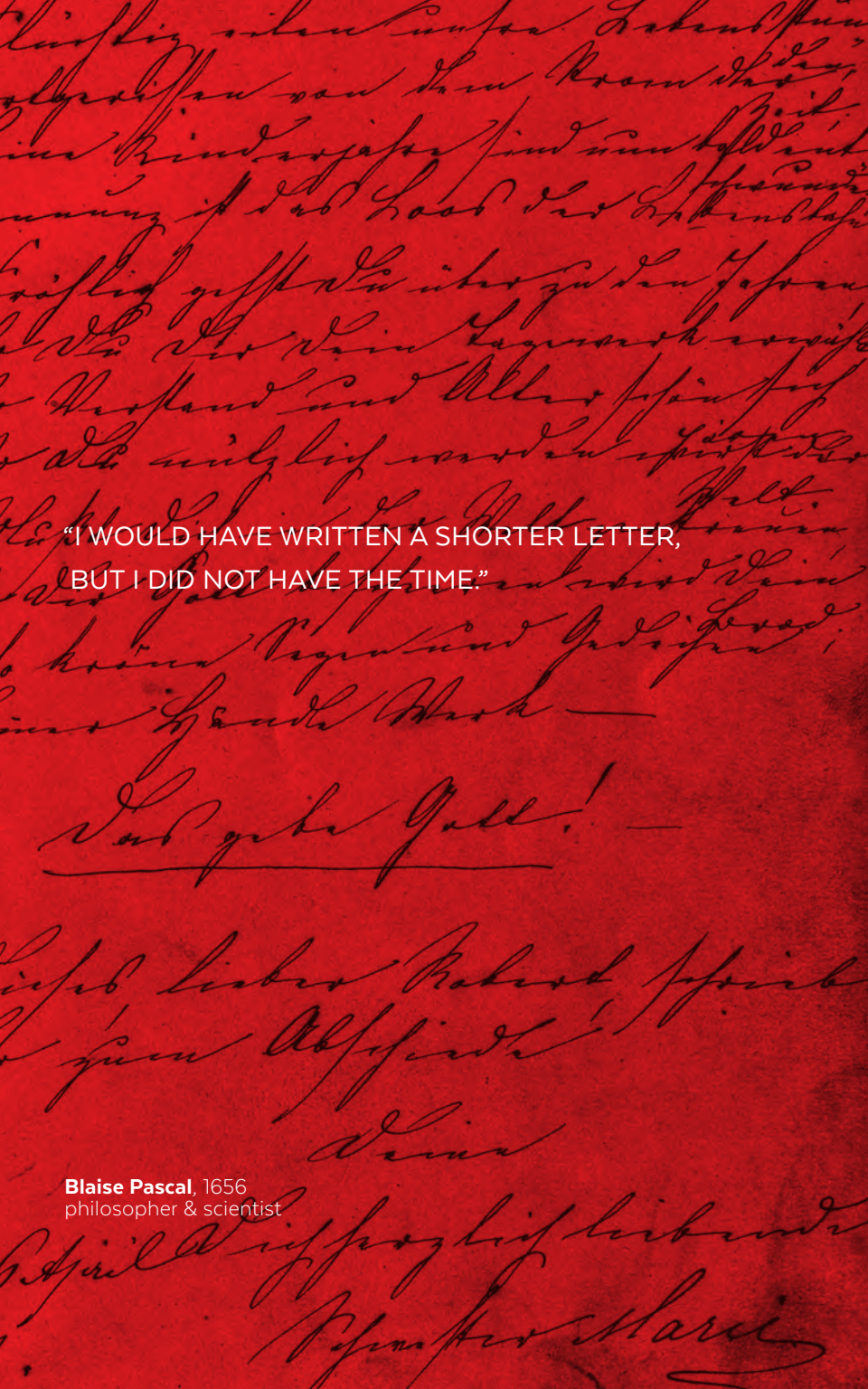
"I WOULD HAVE WRITTEN A SHORTER LETTER, BUT I DID NOT HAVE THE TIME."

Blaise Pascal, 1656
philosopher & scientist

The eloquent self-criticism by the 17th-century French philosopher noted on the opposite page alludes to a key aspect of efficient and effective communication: Clarity takes time and work. The idea of writing a shorter letter by investing more time is a critical concept that we often bypass in the interest of speed.

It is far easier to throw out a lot of words and string together thoughts as they come to mind than to carefully compose, refine, and edit what we say. Yet, these very acts of refinement are what bring clarity and effectiveness to our communication.

ONLY WHEN WE COMMIT THE TIME AND ATTENTION OUR COMMUNICATION DESERVES CAN WE EXPECT OTHERS TO DO THE SAME.

To streamline communication, we must commit the time and attention required to elevate the quality — above quantity.

THE PARADOX OF MORE

Our instincts tell us: If we want more of something, we must do more of something else.

Work harder to get more done.
Share more of ourselves to learn more of others.
Work more to make more money.

The truth is, at a certain point the formula switches direction and the more you put in the less you get out. In economics, this is known as the Law of Diminishing Returns.

THE LAW OF DIMINISHING RETURNS

In all production processes, adding more of one factor of production, while holding all others constant, will at some point yield lower incremental per-unit returns.

Logic might suggest that if three painters can paint a house in five days, 15 painters should be able to paint a house in one! In reality, 15 painters end up getting in each other's way and and all the painters are not able to work at the same tim in the same place, so it ends up taking longer and costing more.

Communication is no different. Our inboxes would suggest that if three emails are good, 33 must be even better!

WE HAVE REACHED A POINT OF PEAK COMMUNICATION, AND IT'S TIME FOR A DRAMATIC SHIFT.

FOCUSED COMMUNICATION

FOCUSED COMMUNICATION

In our first book, LESS & MORE, we introduced a new approach to help communication be more effective called: Focused Communication. This approach emphasizes action-oriented communication focused on achieving goals.

FOCUSED COMMUNICATION IS THE KEY TO UNLOCKING THE POWER OF STREAMLINE.

IDEA → OBJECTIVE

1

FOCUSED COMMUNICATION DIRECTLY CONNECTS AN IDEA TO AN OBJECTIVE.

IDEA   AUDIENCE ⟶ OBJECTIVE

FOCUSED COMMUNICATION IS TAILORED SPECIFICALLY TO THE AUDIENCE.

IDEA — AUDIENCE — MESSAGE ———→ OBJECTIVE

FOCUSED COMMUNICATION STATES A STRAIGHTFORWARD MESSAGE.

IDEA — AUDIENCE — MESSAGE — TECHNIQUE → OBJECTIVE
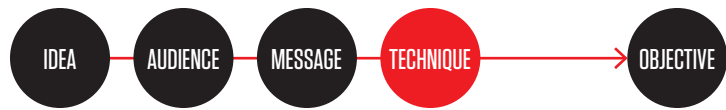
FOCUSED COMMUNICATION USES APPROPRIATE TOOLS AND TECHNIQUES.

IDEA — AUDIENCE — MESSAGE — TECHNIQUE — ACTION → OBJECTIVE
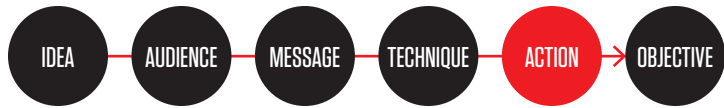
5

FOCUSED COMMUNICATION MAKES CLEAR THE ESSENTIAL ACTION.

IDEA — AUDIENCE — MESSAGE — TECHNIQUE — ACTION → OBJECTIVE
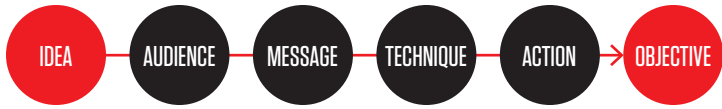
I — A — M — T — A → O

I AM TAO

道

TAO IS THE WAY.

TAO

Pronounced 'dow', TAO is a classic Chinese concept dating from the 6th century B.C.

Originally presented by philosopher Laozi in his work *Tao te Ching,* TAO has a number of ascribed meanings, all of which relate to "the way".

I AM TAO IS THE WAY OF
FOCUSED COMMUNICATION.

As a mnemonic, I AM TAO is a helpful way to remember the elements of Focused Communication.

I	IDEA
A	AUDIENCE
M	MESSAGE
T	TECHNIQUE
A	ACTION
O	OBJECTIVE

The phrase itself is a reminder of the core techniques for achieving Focused Communication, and one we will refer back to throughout this book.

I AM TAO: IN PRACTICE

Dear Reader,

Modern communication has the potential to invigorate organizations with an attitude focused on progress.

IDEA — Presented first, in direct language

When we change from a defensive stance to an of–fensive one, our communication stops slowing down progress and quickly helps move ideas forward.

OBJECTIVE — A clear picture of the goal

THIS BOOK IS FOR LEADERS
Making communication more effective is an incredible opportunity for teams and organizations. Simple chang–es in how we communicate can pay amazing dividends in efficiency and productivity.

AUDIENCE — Specifically defined

THE BIG IDEAS
1. Less said means more done.
2. Focused communication makes ideas truly effective.
3. Effective ideas will change the world.

MESSAGES — Straightforward and easy to see

WHERE DO YOU START
Share the ideas in this book with your colleagues and commit to practicing the principles of Focused Communication everyday.

ACTION — Connected directly to the audience

Viva la clarity!

TECHNIQUE — A short and honest personal note

INTRO TO STREAMLINING 101

You're likely familiar with the concept of streamlining when it comes to making planes, trains and auto-mobiles aerodynamic. A streamlined form for these vehicles minimizes their resistance as they move, and it allows them to move more easily at high speed, using less energy.

You may also have heard streamlining used in de-scribing processes, where the aim is to increase ef-ficiency by using simpler methods and fewer steps. For example, you might streamline an ordering process or checkout system.

In both cases, the intent is to address two factors that slow things down: FRICTION and DRAG.

FRICTION
External resistance

DRAG
Internal resistance

Each slows down progress and makes communication suffer.

ARE YOU PLAYING TENNIS?

The speed of today's communication can quickly make us feel like we're in a constant state of defense. The balls are coming at us and all we can focus on is keeping them in play. Quickly replying to an onslaught of messages may clear our inbox for the moment, but everyone we're communicating with is trying to do the same thing!

COMMUNICATION VOLLEYS HAVE A LOT OF MOTION BUT VERY LITTLE SCORING.

WHEN YOU SHOULD BE BOWLING.

Bowling is focused on accuracy. The highest score comes from bowling the fewest balls. Taking the time to focus and aim with strategy sets the target of closing the frame with a single bowl. When we take this approach with our communications, we can stop focusing on the speed that leads to the volleys. By focusing on closing the communication our interactions become strategic instead of reactive.

TAKING THE TIME TO AIM FOR A STRIKE TAKES LESS EFFORT THAN PLAYING FOR A VOLLEY.

SPEED

VS

STRATEGY

WHAT IS STREAMLINING

The aim in streamlining communication is to shape our messages in ways that reduce friction and drag, allowing our ideas to move smoothly and efficiently towards their goal.

Streamlined communication removes the unnecessary complications in communication that cause messages to be misunderstood or misinterpreted. For example, in sending direct messages aimed at just the right individuals, the friction produced by complex, group-oriented communication can be eliminated.

Streamlining also focuses on the goal of good communication: Helping move ideas along with momentum. When we effectively streamline communication, we are able to stay focused on progress and not just the process.

STREAMLINED COMMUNICATION IS AN EFFECTIVE MEANS TO AN END.

SWITCHING TO OFFENSE

THE POWER OF CLARITY

CASE STUDY: MACROXCHANGE

MacroXchange operates a nimble team across offices in different time zones throughout the U.S. The team relies on email to keep everyone informed, and it was becoming clear that distributed team members were regularly working different hours with different preferred windows for communication.

At the same time, the leaders of MacroXchange wanted to insure that their team was not working around the clock. The time needed to pause and step away from work is highly respected at MacroXchange. Yet, with the wide ranging work windows, emails flowed throughout the company around the clock.

To address this, MacroXchange took the remarkably simple — yet often overlooked — step of defining communication boundaries and expectations and sharing these with the entire team. These guidelines removed all ambiguity, replacing confusion with a sense of clarity knowing everyone was communicating with the same protocols.

SAMPLE MACROXCHANGE COMMUNICATION GUIDELINES

WINDOWS OF WORK

Weekdays	9am - COB local time
Weekends	None
Holidays	None

Communications outside of this window should not expect attention until the next work day window.

Be aware your local time and your recipient's time may differ and plan accordingly.

URGENT MESSAGES

For urgent messages outside of the work windows, please selectively use text messages to coordinate a call. Avoid conversational text messages when possible.

MEETING PREFERENCES

For meetings of more than two people, consider these preferences:

First Option:	Conference Call-In Line
Second Option:	Online virtual meeting
Third Option:	In-person meeting

OUTCOMES

After implementing a handful of meta-communi-
cation guidelines, MacroXchange saw a number of
improvements throughout the organization.

THOUGHTFUL PLANNING AHEAD

With the understanding of colleagues work win-
dows, team members quickly adapted to this
reality and planned communication accordingly.
The simple fact of knowing that a colleague is not
expected to give attention outside of their work
window quickly caused most of the work and com-
munication to adapt accordingly.

PRESSURE RELIEF

In knowing that everyone was working with the
same expectations, the previous pressure to be
available around the clock immediately reduced the
pressure on team members.

COLLABORATION

The uniformity of the guidelines and respect at all
levels in the organizations encouraged the spirit of
working together instead of individually.

CONCLUSIONS

A lack of meta-communication (communication
about communication) is the cause of tremendous
strain and anxiety within organizations. When there
is little to no clarity, poor assumptions and false
interpretations cause unnecessary confusion within
the organization.

When we remove ambiguities and clearly define
expectations, then communication can focus on the
goals at hand and leave behind the inefficiency of
second-guessing.

THE MORE WE COMMUNICATE ABOUT COMMUNICATION, THE LESS COMMUNICATION WE NEED.

COMMUNICATION IS A TEAM SPORT.

Most time management focuses on individual actions, but highly productive people can still be mired in poor communication coming at them from their team. Organizations are leaving productivity gains on the table when they haven't clearly defined their communication cultures.

The first step to playing an effective game is understanding the rules. Most organizations (teams) never take the time to come together and agree on the rules. Instead, everyone runs around with their own idea of what the rules are without sharing their perspective or inquiring about the perspective of others.

The first step for streamlining communication is agreeing on the rules.

What are the expected windows for team members to be available online during the week?

What about the weekend or on holidays?

What is the most effective way to reach a team member who is out of the office on a business trip? Text message? Email? Phone call? Skype? Slack?

These are just a few of the types of undefined scenarios for which we could likely find dozens of different and conflicting answers from team member to team member.

COMMUNICATION GUIDELINES

For teams and organizations, the creation of communication guidelines can be an eye-opening process. Whether you have a small team of three co-founders building a startup or a group of hundreds working together around the globe, the simple act of agreeing on basic communication guidelines can pay immediate dividends.

A simple set of guidelines will allow everyone to quite literally "be on the same page" when it comes to expectations.

It's important that everyone knows the rules you are establishing are guidelines, not hard policy; there are always exceptions to the rules. Everyone should be trusted to use their own best judgement in special situations and not be restricted by an overly rigid policy.
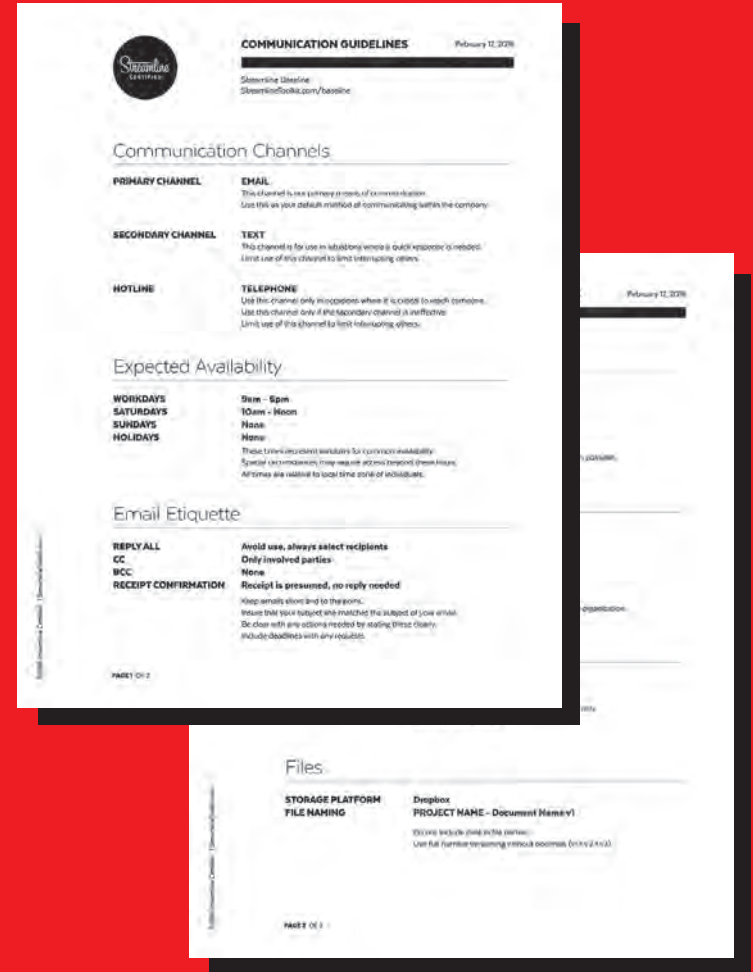
See the STREAMLINE GUIDELINES at:
StreamlineCertified.com/guidelines

EFFECTIVE GUIDELINES

DEFINE

The creation of the communication guidelines can be a collaborative process to ensure that multiple perspectives are being taken into account. By working on these with team members, the resulting decisions are far more likely to be respected and practiced as everyone has had a hand in their creation. The guideline outline that follows can give you a good starting point for the decisions to be discussed and made.

SHARE

Once you have created the guidelines, it is important that they be distributed across the team or organization to be certain everyone involved in regular communication is aware. Also, adding these guidelines to any on-boarding process or new-hire introduction can create a strong impact by reducing the typical learning curve for communication within an organization.

PRACTICE

As a team exercise, it is important that the guidelines be respected and followed with consistency. The spirit of the exercise is to help everyone become more efficient and remove confusion. As the team collaborates in practicing these newly defined guidelines, the aim is for streamlined behavior to become second nature; a natural asset to the organization's culture.

THE STREAMLINE TOOLKIT

To help you create your own guidelines, we've created a free online toolkit. Visit the website below and create your own guidelines in just a few minutes. This can also make for a spirited team exercise at your next meeting!

StreamlineToolkit.com

SUGGESTED GUIDELINE TOPICS

COMMUNICATION CHANNELS

What are the primary, secondary, and emergency communication channels for your team?

What are reasonable expectations for response times across these channels?

EXPECTED AVAILABILITY

What is the expected availability for your team on work days, weekends and holidays?

EMAIL ETIQUETTE

Who is expected to be included in communication threads?

How does your team handle email chains and long threads?

VIRTUAL MEETINGS

What is the preferred tool for hosting virtual calls/meetings?

How are meeting and call invitations expected to be shared?

COLLABORATION

What tools or platform are preferred for collaborating on documents?

How are work-in-process comments and editing cycles managed across your team?

DOCUMENTS

What are the preferred formats for presentations, spreadsheets and written documents?

How are final documents shared and distributed inside and outside the team?

FILES

Where are shared files stored for the team?

What is the naming and versioning protocol for document files?

MEMOS

Each of the following chapters conclude with a collection of friendly BEST PRACTICE MEMOS to be shared. These memos are designed to introduce and reinforce key streamline ideas in teachable moments.

COMMON SENSE IS THE FOUNDATION OF STREAMLINING, SO MANY OF THESE IDEAS MAY ALREADY BE FAMILIAR TO YOU.

These memos are available via StreamlineToolkit.com. From there you can share the Memos as links. You can also download the Memos to use as attachments or reminders when you encounter situations that could use some streamlining.

MEMOS PRESENT FRIENDLY REMINDERS OF CONCEPTS WE OFTEN KNOW BUT SOMETIMES OVERLOOK.

YOU GET THE FEEDBACK YOU ASK FOR.

The more clear you are on what you hope to receive for feedback, the more clear your feedback will be. Be specific about what you expect to get by asking with detail.

STREAMLINING

The following sections provide details and techniques for getting the most out of STREAMLINING in everyday work:

IN WRITING

MEETINGS & CALLS

DOCUMENTS

PRESENTATIONS

FUNDAMENTALS FOR

WRITING

It's 5:45pm and Catherine is one email away from inbox zero. It has taken her all day to get through them and she is sick of it. But freedom is near. She responds, copying everyone on her team - just in case.

It's Saturday and Kevin is cheering on his daughter at her soccer game when his phone buzzes. It's an email from his boss asking about the presentation for next week. He tries to turn back to the game but ends up texting another colleague to get a status update.

It's been 28 hours and Eric doesn't understand why no one has responded to his email. He spent so much time writing it - more than 2000 words of sheer brilliance!

We are overwhelmed by the written communication entering our lives.

But are we also part of the problem?

CASE STUDY: BLUE SKY BANK

The email to the right is an example of a typical corporate email we've all encountered at one time or another. In this case, first contact is established between a representative of Blue Sky Bank and the president of a Home Owner's Association (HOA). The two have never spoken, never met, and have never had any contact.

This real-world example highlights the often overlooked opportunities available to us within everyday written communications. We have dissected this brief introduction in the pages ahead to shine a light on the friction and drag typically of non-streamlined messages.

SUBJECT: Questionnaire (Williamson)

Hello,

Can you please complete and return the attached questionnaire?

I also need the name or contact information for the Master Homeowners Insurance and/or copy of the Dec page.

Thank you,
Jessica Hargrave | Mortgage Sales Assistant
Residential Mortgage NMLS# 31211999
Blue Sky Bank | MC 1717
1717 Yorkville Avenue | Toronto, Ontario | M5R 1C2
P: 416-555-1212 | F:800-555-1213
JHargrave@BlueSkyBank.com

BLUE SKY BANK | expect more

Be aware that if you reply directly to this message, your reply may not be secure. Do not use email to send us communications which contain unencrypted confidential information such as passwords, account numbers or Social Security numbers. If you must provide this type of information, please visit blueskybank.com to submit a secure form using any of the Contact Us forms. You should avoid sending any inquiry or request that may be time sensitive. The information in this email is confidential – it is intended for the individual or entity to whom it is addressed. If you have received this email in error, please destroy or delete the message and advise the sender of the error.

Williamson Condo Quest bl.pdf

INITIAL READING

The previous email represents 'First Contact' be–
tween a bank representative and the president of
an HOA, yet no context or introduction has been
provided. When such vague messages are received,
the reader is forced to decipher hidden meaning
and ask themselves:

Is this junk mail?
Is this directed at me personally?
How important is this?
How much time will this take?
Is there a deadline?
What is the next action?

Let's take a closer look.

THE SUBJECT LINE

Questionnaire (Williamson)

The subject line gives very little explanation or con–
text around the information contained within, which
forces the reader to open the email and determine
its relevance. If this email were received on a smart
phone, you likely would scroll past not knowing or
caring if this were spam. Had the subject line been
better crafted, the reader could easily swipe to file
the contents digitally (and mentally) and address it
later.

REQUEST 1

Can you please complete and return the attached questionnaire?

The real question is: Will you? Without any framing of this request, the reader is left to decipher the purpose of the inquiry. More importantly, there is no reference to a deadline; when does the sender need this to be completed and returned? If a timeline had been established, the urgency (or non-urgency) would be obvious.

REQUEST 2

I also need the name or contact information for the Master Homeowners Insurance and/or copy of the Dec page.

Although it is not clear, it seems the request is related to this Williamson's mortgage, but that is only a guess. The sender has not been straightforward in identifying her role, or the relationship with this Williamson client to the recipient of the email. This lack of clarity makes it difficult to consider her request a priority.

HER SIGNATURE

Thank you,
Jessica Hargrave | Mortgage Sales Assistant
Residential Mortgage NMLS# 31211999
Blue Sky Bank | MC 1717
1717 Yorkville Avenue | Toronto, Ontario | M5R 1C2
P: 416-555-1212 | F:800-555-1213
JHargrave@BlueSkyBank.com

Her signature is nearly longer than her communication! In fact, this is the first place we discover that this note is from a bank. It is not until the end of her message that we can finally see the source of her questions and can piece together the requests must be related to a financing change Mr. Williamson is making.

The pieces of the puzzle begin to take shape!

LEGAL DISCLAIMER

Here in the legal disclaimer included with her email.

Be aware that if you reply directly to this message, your reply may not be secure. Do not use email to send us communications which contain unencrypted confidential information such as passwords, account numbers or Social Security numbers. If you must provide this type of information, please visit blueskybank.com to submit a secure form using any of the Contact Us forms. You should avoid sending any inquiry or request that may be time sensitive. The information in this email is confidential – it is intended for the individual or entity to whom it is addressed. If you have received this email in error, please destroy or delete the message and advise the sender of the error.

In reading this, we discover the bank does not consider email a safe or timely way to communicate, their website contains multiple "Contact Us" forms — and, it's very possible this email was not intended for you!

While many institutions require these appended legal disclaimers, they very often serve little purpose yet seem to create unnecessary clutter in communication chains.

ATTACHMENT

Williams Condo Quest bl.pdf

As we continue our sleuthing, we open the PDF to discover it is six pages long, contains 56 questions, and had been scanned from a paper document. The document has partial information filled in by hand. To complete this, it will mean printing it out, filling it out by hand, scanning, then returning.
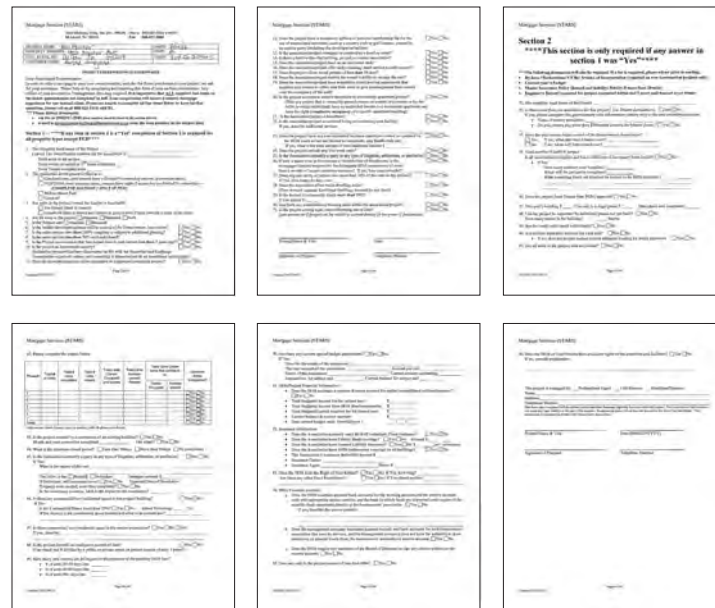
BRANDING

BLUE SKY BANK | expect more

And finally, the logo of the company is included as a tiny graphic with their tag-line: EXPECT MORE.

Presumably, this bank wants us to raise our expectations of banking, by looking to them as the gold standard.

CHALLENGE ACCEPTED.

INVESTMENTS & RETURNS

From a fiscal perspective, here's a quick recap of the deal:

THE BANK
INVESTMENT THEY ARE WILLING TO MAKE
> 1 minute impersonal email
> 2-3 minutes of follow-up clarification emails
> Minimal effort and engagement

RETURN THEY EXPECT
> Opportunity to close a new mortgage
> Profit of a few thousand dollars

RECIPIENT (POTENTIAL CLIENT)
INVESTMENT ASKED OF THE RECEIVER
> Time spent parsing the email for context
> Time clarifying and replying to the requests
> 45-minutes completing paperwork

RETURN ON OUR INVESTMENT
> Negative engagement experience with the bank
> Disbelief in the bank's positioning: Expect More

STREAMLINING THE EMAIL

So, what could this exchange have looked like?
With an investment of slightly more time, and an
emphasis on helping the audience both understand
and complete the tasks, it would be very easy to
reverse the experience from negative to positive.

The revision at right illustrates the following:

IMPROVEMENTS
> Clear and functional subject line
> Proper context and introduction
> Clear tasks and actions to be taken
> Creation of an online form for easy completion
> Clear timing request
> Sincere empathy and appreciation
> Personal connection with a potential client

Ultimately, a small investment of time could trans-
form an unfriendly and time-consuming exchange
into a positive expression of the bank's message.

We should all EXPECT MORE from our bank and our
communications!

SUBJECT: Condo details needed By July 25th
             for Mark Williams refinancing

Hello Raj,

Our bank is working with a neighbor of yours, Mark Wil-
liams, to refinance his mortgage. He gave me your name
and email as the person responsible for the HOA.

To help us complete his paperwork, we will need two (2)
things from you:

1. MASTER HOMEOWNERS INSURANCE
> Copy of the declarations page - or -
> Contact information for the insurance company

2. ONLINE QUESTIONNAIRE
The link below has a questionnaire you can complete
online.
                    > bit.ly/BSBQuestionnaire

DUE DATE: JULY 25th
We aim to complete Mark's paperwork by August 1st,
so if you can find the time to address these by our due
date it would be a great help.

We know these requests can be time-consuming, and
we truly appreciate you helping out your neighbor. As a
thank you, I'd love to offer you access to our premium
refinancing service in the future. Just contact me directly
if you would like a free consultation.

Jessica Hargrave
Mortgage Assistant, Blue Sky Bank
416-555-1212 | JHargrave@BlueSkyBank.com
Expect more.

STREAMLINING WRITTEN COMMUNICATION

THE STATE OF THE ART

Written communication has undergone a dramatic evolution within the past 30 years. As technology evolved, so too have our methods of sharing and reading. Where the skill of typing was once a specialized area of focus for a select few, keyboard use has become the basis for everything; from writing computer code to texting our parents. The proliferation of the written word, has never been greater.

In particular, within business communications, we have seen a number of fundamental shifts take place that have revealed new dynamics for written communications worth reviewing.

TRENDS

The blurring of lines between personal and work communications have led to an influx of casual communication characteristics throughout traditionally formal business writing.

Social sharing and the integration of social platforms within business (for marketing and feedback for instance) have further blurred the etiquette and style expectations.

Expanding remote workforces have created virtual replacements for the office water-cooler, where team members can gather and chat from anywhere in the world.

These trends and others show no sign of slowing down, making it clear how important it is for teams and organizations to have strong guidelines and strategies for written communication.

CHANNELS

Modern written communication is organized into various channels, each with a particular style and approach. Like TV channels, we come to expect certain types of messages to come through each of these different channels.

While these may be our expectations, in truth, the lines between each of these channels are not clearly defined. It is this very lack of definition and blurring at the edges, which causes much of the confusion and distress we experience with modern communication.

AGREEMENT ON HOW TO USE DIFFERENT
CHANNELS IS THE FOUNDATION FOR AN
EFFECTIVE COMMUNICATION ENVIRONMENT.

A GROWING VARIETY OF CHANNELS

EMAIL
sequential messages across individuals & teams

INSTANT MESSAGES (Texts, iMessages, etc)
1-to-1 messages for immediate attention

CHAT (Skype, Slack, etc.)
many-to-many messages for conversations

DIGITAL DOCUMENTS
distribution of formalized ideas and results

SOCIAL PLATFORMS (Twitter, Facebook, etc.)
personal expression

TIMING: NOW VS. LATER

One clear way to approach these channels is to consider how each relates to the timing of communication. Almost all communication is an exchange back and forth between people, and the timing of that exchange is a big factor in how a channel should be used.

SYNCHRONOUS CHANNELS

For most of our history, the most common type of communication was between people in the same place at the same time having a conversation. Two or more people discussing a topic in the same room creates a very dynamic exchange that can quickly change direction, reach resolution, or simply answer questions without delay.

We see this in today's work environment as meetings & conference calls. Where these discussions once required everyone to be in the same place, technology has made it possible to hold these synchronous exchanges by audio and video calls with people distributed around the world.

ASYNCHRONOUS CHANNELS

As people spread further apart, it was necessary to create new channels for discussion that allowed for exchanges that couldn't happen in real-time. The simple act of writing letters bridged tremendous gaps of space between individuals — while adding a gap of time as well. Knowing that your recipient cannot immediately reply changes the nature of the communication significantly.

Asynchronous communication, which has evolved from letter-writing to email, creates an important buffer for thought in the communication exchange. Both the sender and receiver are afforded greater time for thoughtful consideration and organization of their ideas before sharing them — an important distinction in our fast-paced world.

CHANNELS: DECIDE & DEFINE

Understanding and consciously electing when to use which path is a critical aspect in designing an efficient communication strategy. When we select and agree to use one channel for synchronous com–munication and another channel for asynchronous communication, the ambiguity of expectations is eliminated.

EVERYONE SHOULD KNOW WHAT TO EXPECT AND WHAT IS EXPECTED.

Marcus is the leader of a large team. Since he works for a well-known company he is a powerful client for many vendors. He is very organized and considers himself a productivity master. Marcus has a habit of sending emails with requests for follow-up late on Friday afternoons and throughout just about any holiday. He sees it as a great way to empty his mind so that he can fully enjoy his time with his family.

But has he considered what impact he is having on his recipients?

Communication is always a two-way street. While it may be convenient and freeing to send off messages to clear your mind, those same thoughts are now the focus of your audience.

When we practice the art of considering our audience, we quickly learn that it is often as important to understand when our message will be received as when it is sent.

Process and compose your messages when it is convenient for you, but send them (or delay delivery) when they will be best for your audience to consider.

FOCUSED COMMUNICATION:
WRITTEN COMMUNICATION

IDEA — AUDIENCE — MESSAGE — TECHNIQUE — ACTION → OBJECTIVE
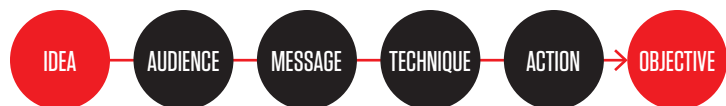
A powerful way to streamline writing is to apply the Focused Communication principles to clear the path from IDEA to OBJECTIVE.

Here we have the I AM TAO framework put to the test to see how this applies to writing.

With your IDEA and OBJECTIVE defined, you can then identify the AUDIENCE, MESSAGE, TECHNIQUE, and ACTION for making the connections.

AUDIENCE

FOCUS ON YOUR PRIMARY AUDIENCE
Limit your audience to only those who have a direct connection to the objective of your message. Every person you include in an email dilutes its impact and focus to the individuals you are addressing. When in doubt, don't cc: or bcc: anyone else.

ADDRESS YOUR AUDIENCE SPECIFICALLY
Address each individual to insure that the recipient quickly knows the message is intended for them. Sending messages to a "Team" or not addressing anyone by name misses an opportunity to connect your audience with your message.

ALWAYS CONSIDER THE CONTEXT FOR RECEIPT
Where will your audience be when they receive your message? You should always consciously consider the time, location and context when you expect your message will be read and adjust accordingly. A message to a traveling colleague can respect the difference in time-zone and high-potential for distraction. Your audience will appreciate your thoughtfulness.

AUDIENCE FEEDBACK LOOPS

The nature of modern communication makes it easy to include as many people as we like. Inviting team members to a virtual meeting or copying colleagues on an email costs us nothing…or, so it seems. In reality, every person we add to an interaction adds more connections to manage, more opinions to consider, and more opportunities to derail our progress.

## EVERY ADDITIONAL AUDIENCE MEMBER ADDED MULTIPLIES THE FEEDBACK LOOPS.

As the network of participants grows, the number of feedback loops also grows, until clear communication and progress is impossible. Beware of those risky audience members who can add DRAG to an otherwise STREAMLINED process:
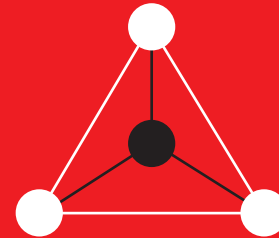
WATCHERS (CC:)
Individuals everyone knows is watching the interaction, but not actively contributing
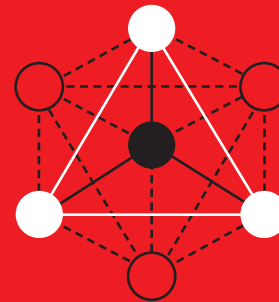
GHOSTS (BCC:)
Indirect participants who are watching in private and might show up unexpectedly!
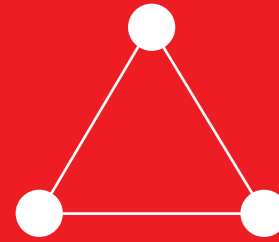
THREE ACTIVE MEMBERS HAVE ONLY THREE COMMUNICATION PATHS.

ADDING JUST ONE WATCHER DOUBLES THE NUMBER OF COMMUNICATION PATHS.

ADDING THREE GHOSTS CREATES OVER 20 COMMUNICATION PATHS.

MESSAGE

POWERFUL SUBJECT LINES

The subject line of an email can be extremely valuable for conveying the true nature of your message. Consider that within dense inboxes (especially on mobile phones), the subject line is most likely the only thing your audience will see when they scan their incoming messages. The subject line can contain the answer to questions, important changes to schedules or plans, and in some cases may be the entire message itself.

SUBJECT:

re: Design Finals Needed - RECEIVED - Expect by noon

SUBJECT:

re: Meeting Friday> - CONFIRMED @3:00 via Skype

SUBJECT:

Thursday team call postponed to Monday @11am - EOM*

*EOM = End Of Message - indicates there is no need to look any further.

MESSAGE FIRST, CONTEXT SECOND

Military officials are trained to begin their communication by stating the bottom line of any communication first. Known as BLUF for Bottom Line Up Front, this method recognizes that time is of the essence, and the key message should not get lost in the middle or fall to the end.

When you practice the BLUF technique, you begin with the salient points or decisions so your message does not have to be parsed. Once you present your key points, you can then follow up with the relevant details and context. Too often we craft messages that work through our logic and thinking, building up to the conclusion. Reversing this approach is much more efficient and effective.

TECHNIQUE

HEADLINES FOR SCANNING

Breaking up your message into scannable sections, each with a descriptive headline, recognizes that most people do not always have the time to carefully read your full message. With headlined sections, the message contents are easily understood in a split second, allowing your audience to prioritize where they should focus.

CALL OUT REFERENCE INFORMATION

When you include information in your message which you know your audience will need to reference — like addresses, dates and times — you should make an effort to increase the accessibility of this information. Instead of including it within the sentences of your message, separate and indent it so that it can be easily spotted when needed.

REVIEW CALL - Design Team

Tuesday, April 26th

9:00am CST via Skype

ACTION

WHAT TO-DO

When you are asking someone to do something specific, present your request in a way that is easy for them to translate into their own to-do item. Like the reference information, actions can be separated and made explicitly clear to avoid any confusion.

> POSTCARD DESIGN FINALS - Approved > To printer today

> FLYER DESIGN - Match brand colors > for approval by EOD

Recall, the ACTION is what ultimately gets us to the OBJECTIVE.

(I) — (A) — (M) — (T) — — — — — (A) — — — — — → (O)

The next section highlights other best practices for streamlining writing across many other areas of communication.

STREAMLINING EMAIL SIGNATURES

KEEP IT SIMPLE.
HAVE TWO VERSIONS.

PRIMARY SIGNATURE

Your primary signature is used in daily exchanges with colleagues and contacts whom all already have your contact information. There is no need to include all of your ancillary information in these common exchanges; it only adds unnecessary information that is always skipped.

> Full Name
> Email address
> Direct phone number only

INTRODUCTION SIGNATURE

Create a separate signature, different from your shorter default signature, to use in special exchanges with new contacts. This more detailed signature provides a full picture of your role and ancillary contact information, but still avoids common elements that are distracting and ineffective — like marketing messages and inspirational quotes.

When your email program only allows for a single signature (like Gmail), aim to limit the number of lines that the signature consumes. Placing secondary information together on a single line helps streamline your signature.

> Full Name, Title
> Email address
> Direct phone number only
> Company Name | Company web address

EMAIL DISCLAIMERS

"LEGAL" DISCLAIMERS

In short, these disclaimers which are so often appended to emails have limited legal value and are unenforceable in almost all situations. Despite their ubiquity, these "legal" messages offer limited protection and provide a false sense of security. No one reads them and they serve no real purpose beyond exponentially expanding every email thread where they are repeated over and over.

The best security is being careful when you compose and address your email, because once you hit send, there's no putting the genie back in the bottle!

EMAIL DEAD WEIGHT

This message is intended only for the use of the addressees shown above, but I must have hit 'send' too fast. It might contain information that may be privileged, confidential and/or exempt from disclosure under applicable law, but that really has no bearing here because I made the mistake of sending it to you. If you are not the intended recipient of this message, you are hereby notified that the review, copying, distribution or other use of any information or materials transmitted in or with this message is strictly prohibited – just a friendly tip that is not enforceable, FYI. If you have received this communication in error, please immediately notify us by return email and promptly delete the original electronic email communication and any attached documentation. We do realize that you won't do this and there's no real way to delete emails entirely, so, yeah I guess I should have thought twice before hitting send.

FRIENDLY FOOTERS

FEELING INSPIRED

Motivational quotes and inspirational messages in email signatures have a very short half-life. They may be read once, but every communication that follows simply gets burdened by these unread and unnecessary components.

Instead of a generic, unspecific inspiration, try connecting with your audience sincerely with personal thoughts that reinforce your message. Personal words will always provide more of an impact than a virtual bumper sticker.

PROMOTIONS

Much like the disclaimers and inspirations, promotions placed in email signatures come across as insincere. Furthermore, they significantly increase the chance that your message can be filtered out as spam!

Keep your signatures simple and personal or risk looking like a robot to the world.

STREAMLINING ATTACHMENTS

JUST SAY NO

Attachments are the potholes of the internet highway. Whenever we attach a file to an email, we create a copy of that document and force our recipients to store and/or file it. Over time, these files (large and small) weigh down our email systems as they become filing cabinets filled with copies and copies of files that are difficult to find or organize. Avoid frivolous attachments and consider an alternative sharing method whenever possible.

STREAMLINING SHARED FILES

Cloud-based technologies make it easy to organize and store files in a central repository which can then be linked to instead of shared. Using this technique, we eliminate the duplication factor and encourage a collaborative organization where teams maintain shared files that don't get out of sync.

STREAMLINING CONFIRMATIONS

FULL STOP

Efficient communication focuses on reducing traffic by eliminating unnecessary communication loops. Recipients who feel the need to reply to an email with a short "Got it." or "Thanks!" are often reacting to an environment of uncertainty. Communication between professionals should give the benefit of the doubt to both the sender and the receiver. Your message should be assumed to have been received and understood.

Messages can also be smartly framed so that it is clear that a non-reply is a confirmation. This simple act of strategically closing communication loops can make huge strides towards a more empty inbox.

Unless I hear from you, I will plan to call you Wednesday at 2:00 your time. NNTR*

*NNTR = No Need To Reply

IN REVIEW: ALL EMAIL BEST PRACTICES

TO: Sharon Swift (sharon@zerogravity.com)

SUBJECT: HEXXIS LAUNCH EVENT - CONFIRMED   **FUNCTIONAL SUBJECT LINE**
                        Fri. Nov 17 @ 3:00p - The Village, 969 Market St.

Sharon,

I'm happy to report we have selected our event space for the HEXXIS launch event. We are confirmed at The Village (also known as 969 Market Street) for Friday, Nov. 17th, from 4:00pm to 10:00pm. Below is a brief agenda for our meeting tomorrow morning:

MARKETING DISCUSSION   **HEADLINING TOPICS**

> Final press release copy - for approval

> Final marketing collateral - for approval

> Special guest speaker - Dorothy Parker, CEO, She Got Game

> Investor dinner

> Timeline > deadlines

> Marketing budget recap

PLEASE REVIEW   **DEFINED ACTION**

I'd like for you to take a look at the website for the venue of the event. I think you will be as excited as I am.

        LAUNCH EVENT VENUE   **REFERENCE INFORMATION CALLED OUT**
        Website: http://969market.com

: : : : :

Leah Sky   **SIMPLE SIGNATURE**

Leah@ZeroGravityGames.com

1-212-555-1212

EVERYTHING YOU REMOVE
MAKES EVERYTHING THAT REMAINS
MORE CLEAR.

STREAMLINING PAYS OFF

Streamlining our written communication has one of the most measurable returns on investment. With the aim of reducing or eliminating unnecessary communications and communication loops, streamlining is a powerful offense in a landscape accustomed to playing defense.

INVEST TIME TO SAVE TIME

Creating thoughtful messages that are clear, focused and easy to act on requires some practice and commitment at first. However, over time, the more straight-forward approach will become a style that comes naturally and quickly.

EDIT FOR IMPACT

Reread every message before you send it and consider what unnecessary pieces can be removed so that your central message can make more of an impact. Remember that everything you remove makes everything that remains more clear.

PRIORITIZE ACTION

Focus your message around the action that needs to be taken to move closer to your mutual objective. Your audience is often looking for direction and definition on what to do next. When we make the action the priority, our communication becomes streamlined with ease.

YOUR SUBJECT LINE MUST MATCH YOUR SUBJECT.

Your subject line is like the cover of your book — it impacts whether someone will want to open and read it. Make it relevant. Make it helpful.

REREAD EVERY MESSAGE BEFORE YOUR SEND IT.

Catch mistakes, correct and simplify your language, and delete unnecessary information when you reread your message before sending it.

AVOID ASKING OTHERS TO 'SEE BELOW'.

Always summarize the context and content to which you're referring instead of forcing your audience to play detective and uncover the importance of a message.

ALWAYS BREAK A THREADED CONVERSATION WHEN THE TOPIC CHANGES.

Change the subject line and do not include the thread history when the topic changes. New ideas deserve new messages.

MEETINGS & CALLS

"Any questions?"
The conference room went silent. Why would Max bring up any real concerns? The decision had already been made long before the meeting began.

Sophia looked up at the clock — nearly the end of the hour. Almost there. It had been ten minutes and two of her colleagues were still debating over a matter that had nothing to do with her.

Peter had never felt so proud - he'd just got to the 9th level - a new personal record! The conference call continued to drone on in the background.

Have you ever been in a meeting like this?

Have you ever run a meeting like this?

MAKING THE SMART CALL

CASE STUDY: SOUTHPEAK SALES

Terri is the new VP of U.S. Sales for Southpeak - a company that represents both digital and physical products for sale through online and physical retail stores. Terri was recently promoted from managing the West Coast Retail territory to now heading up all of sales for the U.S.

For as long as she has been with the company, the one constant has been their Monday sales call which was held from 1:00 pm - 2:30 pm every week. The call would bring together all of the territory managers from both online and retail teams for progress reviews, target setting, and to address any challenges the managers or sales reps were facing. Each week, ten managers from the retail group and eight more from the online group were expected to be on the call.

A typical call would get started around 1:10 pm as all of the managers joined from different time zones - many on the road or joining in between their own team meetings. The sales VP would ask

for a quick rundown of progress on key accounts from all of the retail managers, oftentimes leading to discussions and tangents that could take the call to around 2:00pm. The same would be repeated for the online managers. As 2:30 rolled around, managers would start to drop off the call to join other calls or appointments. If they were lucky, the group would have 10-minutes for discussing challenges. The managers were always quite effective at helping their peers find solutions, and these solutions were often valuable for all of the managers to hear - but few could afford the time to stick around every week.

Terri had been attending these meetings for years, and now that she was in charge, she was excited to make them more effective.

ROOM FOR IMPROVEMENT

Terri had authority from her boss to run the meetings the way she wanted so long as she could maintain a clear picture of what was happening in the field at all times. Terri decided to take a fresh look at the Monday sales call format and see where she could make improvements.

WHO WERE THE CALLS FOR?
Asking 18 of her most important team members to commit 90-minutes meant they should all get something valuable from the call. While some overlap between the retail and online teams did exist, these two different markets typically faced different challenges.

Maybe not everyone needs to be on the call at the same time?

WHY WERE THE CALLS ON MONDAYS?
Terri knew from her own experience that the Monday mid-day timing was very often an inconvenience. It meant she had to schedule her travel and other meetings around it, oftentimes making Mondays very unproductive. Mondays were also an opportunity to set a strong momentum of action, something the calls had a way of defeating.

Maybe there is a better time for connecting the managers?

WHAT MADE THE CALLS VALUABLE?
Like many of the other managers, Terri would oftentimes sit through the first hour of the call (when updates were shared) while waiting for the last part of the call (when challenges could be discussed). This interaction with the other managers was invaluable and always full of insight.

What if she made this the focus of the calls?

Terri considered all of these questions before deciding how her sales calls would be different.

A NEW APPROACH

Knowing she had the support of her boss, Terri decided she would make some dramatic changes and see if she could accomplish the same goals with a different approach.

FRIDAY RECAPS & HOT TOPICS

In place of the recaps that took up most of the Monday calls, Terri asked each manager to email her brief account updates on Friday by 2:00 pm. These recaps highlighted progress with each of the key accounts, and more importantly, identified the one big issue each manager had from that week. Terri then summarized the hot topics and sent her team an end-of-week email with these topics that would be addressed on Monday's call

THE SALES MANAGER'S SLACK CHANNEL

When she was managing the West Coast Retail territory, Terri had setup a Slack Channel* for her and 3 of her peers. This ad hoc network had been invaluable for quick interactions and she thought it could be a big help for all of her managers. Terri setup the Channel and invited all of the managers to share and interact as needed.

30-MINUTE MONDAY CALLS

Terri moved the Monday call to 9:00 am on Mondays and limited it to 30-minutes. The focus of the Monday call switched solely to the hot topics identified in advance, foregoing the updates, which were handled by email on Fridays. These focused calls allowed the team to concentrate on items where their collaboration could benefit everyone the most. With these calls completed by 9:30, Mondays could return to being productive for everyone involved.

Slack is an instant messaging client that uses channels to group together teams

A REAL IMPACT

Within a few weeks, Terri's new approach was proving to be incredibly effective and popular across her whole sales team.

Sending a Friday Recap at their convenience proved to take little time but convey all of the same info Terri needed. The managers also loved that they could complete this when it was convenient for them and not at a fixed time.

The hot topics painted a clear picture of the priorities for each manager and allowed Terri to step in and address what she could without involving the whole team.

Sharing topics for Monday on Friday allowed her team to consider these more carefully than simply reacting to them on Monday as they had done before.

The team began to use the Slack Channel provided to pick the brain of their colleagues more than they had in the past, leading to real-time solutions across territories.

On occasion, the team even decided they did not need to have a Monday call at all.

Overall the team found they saved a collective 60-hours a month while achieving the same clarity and increasing the engagement amongst the group.

STREAMLINING MEETINGS & CALLS ARE SOME OF THE EASIEST WAYS TO IMPROVE EFFICIENCIES & EFFECTIVENESS IN THE MODERN WORKPLACE.

STREAMLINING MEETINGS & CALLS

SEE WHAT I'M SAYING?

The instinct for people to get together and discuss ideas is natural. In-person communication is incredibly rich with characteristics so often lost in writing.

NON-VERBAL COMMUNICATION

Body language	Tone and speed of delivery
Eye contact	Facial reactions

Meetings and calls are also by their nature synchronous, creating an environment where dynamic discussion and engagement is the norm. The extremely high-value of live, in-person engagements is without doubt.

However, in the modern business world, when you ask individuals what parts of their day are most productive, most efficient or most enjoyable, meetings and calls hover at the bottom of almost everyone's list.

When we look at meetings & calls through the lens of Focused Communication, there are tremendous opportunities to streamline for more efficient and effective communications.

FOUR TYPES OF MEETINGS

There are basically four types of meetings that are popular in today's business culture.

IN PERSON-MEETINGS

Meetings where everyone is together in the same physical space and can readily interact and talk with each other. These are the benchmark for high quality, engaging discussions that make meetings valuable. A conference meeting, team meeting, or even spontaneous meeting of two individuals in the hallway each share the many benefits of in-person interactions.

VIDEO MEETINGS

Video technology has evolved to approximate the experience of the in-person meeting, yet still allows individuals to be distributed across multiple loca-tions. While these meetings do allow us to see each other and engage in ways similar to how we do in person, they still suffer from limitations — like the lack of direct eye-contact and the inability to have sideline discussions like we can in-person. Unfor-tunately, the technology involved means it's not always easy to arrange or attend these video con-nections.

AUGMENTED CALLS

Another popular format for meetings has evolved from our presentation-oriented business culture. Sharing slides or documents for discussion on a call has become a norm via screen-sharing software. These augmented conference calls allow a group to easily be on the same page at the same time while still working from different locations. On the down-side, the lack of non-verbal interaction can quickly reduce clarity in these meetings.

CONFERENCE CALLS

Conference calls provide a convenient method for gathering individuals across multiple locations. The interactions are fairly limiting, as much about our colleagues actions and reactions are left to the imagination. How do we interpret silence on the line? Do we know if everyone is really paying at-tention, or are they focused on something else? Ultimately, conference calls favor convenience over quality in most instances.

UNDERSTANDING MEETING FORMATS

For each of these meeting types there are ben-efits to gain and trade-offs to be made. When we understand that each of the formats has unique values, we can weigh the factors that are important to us and select accordingly. Understanding these strengths and weaknesses of each format can also be valuable as we participate. When we accept that not all meetings are created equal, we can begin to adapt our use and expectations.

A comparison of meeting types across key factors. Consider the strengths and weaknesses of each when selecting the appropriate engagement for the goals you have.

ENGAGEMENT
How well will the contributors be able to share, listen and interact?

CONVENIENCE
How easy is it for each individual to participate from where they work?

EFFICIENCY
How easy is it for participants to attend with little notice given?

EFFECTIVENESS
What is the likelihood of having a meaningful exchange and outcome?

	IN-PERSON MEETINGS	VIDEO MEETINGS	AUGMENTED CALLS	CONFERENCE CALLS
ENGAGEMENT	⬤ (large)	⬤ (medium)	• (small)	• (small)
CONVENIENCE	• (small)	• (small)	⬤ (large)	⬤ (large)
EFFICIENCY	⬤ (medium)	⬤ (large)	⬤ (large)	⬤ (large)
EFFECTIVENESS	⬤ (large)	⬤ (large)	• (small)	• (small)

FOCUSED COMMUNICATION:
MEETINGS & CALLS

Applying the I AM TAO framework allows us to provide a streamlined approach to meetings & calls. While many of these concepts are common sense or Business 101, they are worth revisiting if only to highlight how Focused Communication applies to all forms of business communication.

IDEA — AUDIENCE — MESSAGE — TECHNIQUE — ACTION → OBJECTIVE
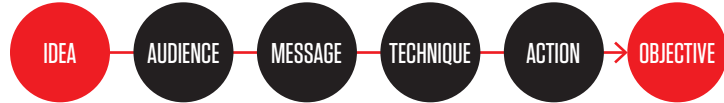
IDEA

WHAT IS THE PURPOSE OF THE MEETING
Every meeting is initiated because of an idea. The catalyst for a valuable meeting typically focuses on a need, such as:

A discussion on a specific matter

Gathering feedback and opinions

Looking for insight

Making a decision

AUDIENCE

WHO HAS AN INTEGRAL ROLE IN REACHING THE OBJECTIVE
Limit the audience for a meeting to only those who have a true role in moving toward the objective. Everyone in a meeting is expected to contribute.

Everyone in a meeting should be a participant, not an attendee.

BE RESPECTFUL OF THE COMMITMENT YOU ARE ASKING OF OTHERS
Attending a meeting means committing time to prepare, attend and focus on one thing at the expense of not focusing somewhere else. We all know the value of our own time, and we must respect the time of others equally.

When in doubt, don't invite.

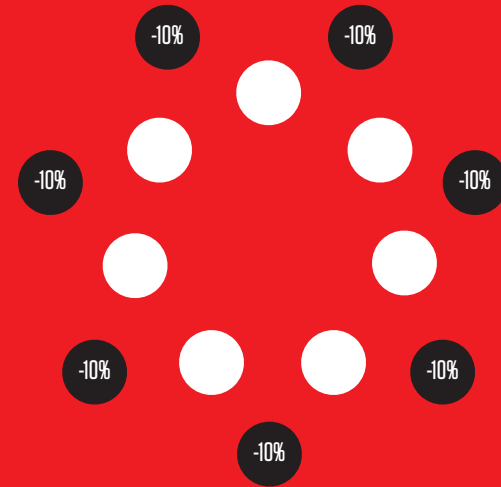**UNNECESSARY MEETINGS**

15%
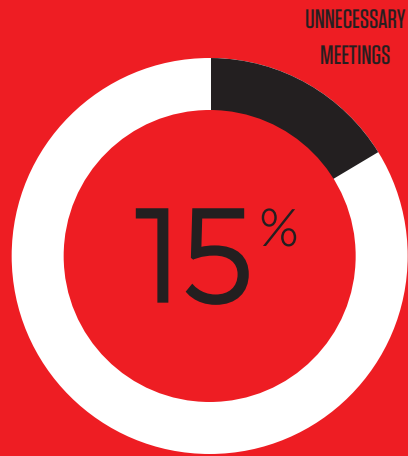
MANAGERS REPORT THAT 15% OF THEIR ENTIRE WORKDAY IS SPENT IN MEETINGS THEY DID NOT NEED TO ATTEND.

We would never tolerate 15% waste in any manufacturing process – why should we accept wasting this much time?

-10% -10% -10% -10% -10% -10% -10%

BEYOND SEVEN PARTICIPANTS, THE LIKELIHOOD OF A GROUP MOVING FORWARD ON A DECISION DECLINES BY 10% WITH EACH PERSON ADDED

SOURCE: TIME, TALENT, ENERGY – Overcome Organizational Drag and Unleash Your Team's Productive Power, 2017 by Michael C. Mankins and Eric Garton

MESSAGE

KEEP THE SCOPE OF THE MEETING FOCUSED

It's quite easy to get off track in discussions when a group of people are encouraged to engage and share. A leader focused on the objective can find a balance that embraces sharing and reigns in tangents.

It is the role of the leader to steer the conversation.

TECHNIQUE

USE THE TIME TOGETHER FOR DISCUSSION, NOT SHARING

The highest value from gathering people together is from facilitating interaction. A group of people assembled to receive information or watch a presentation is not a meeting. Prepare the participants ahead of a meeting by sharing what you expect everyone to know so that the time together is spent in discussion, not silence.

Share materials ahead of a meeting, not during.

ACTION

EFFECTIVE MEETINGS REACH A CONCLUSION OR MAKE A DECISION

The purpose of most meetings is to move forward by collective consent. The nature of discussions can sometimes make it unclear whether progress has been made. Ensure that your meeting concludes clearly with everyone who has participated knowing exactly what has been resolved.

A meeting is over when the decisions have been made.

OBJECTIVE

WHAT IS EXPECTED AS A RESULT OF THE MEETING

Meetings can be important steps in moving ideas or projects forward. An effective meeting has a clearly defined objective that is the focus. This objective is best presented before or at the very beginning of the meeting.

Make sure everyone knows the destination before they jump in the car.

LET'S HAVE A MEETING

A very effective way to streamline meetings & calls is to consider whether one is needed or not. The thinking that leads us to call for a meeting can be fine-tuned when we consider the value and expectations we have from gathering a group together.

The list below is a good reference for needs a meeting or call can fulfill.

- ✓ Focused discussions
- ✓ Active feedback
- ✓ Opportunity for explaining
- ✓ Opportunity for listening
- ✓ Chance to question
- ✓ Soliciting opinions & perspectives
- ✓ Collective decision-making

LET'S NOT

Oftentimes we confuse the act of gathering people together with a meeting. There are a multitude of group interactions that do not require a meeting of everyone in the same place at the same time. When we recognize these situations, we can easily take a different path.

- ✗ Simply sharing information
- ✗ Telling without a need for reaction or feedback
- ✗ Distributing materials
- ✗ Reviewing something collectively

All of these are examples where it may be convenient to the organizer to gather a group together, but it is not efficient for the audience. As workplaces becoming decentralized and distributed, it's critical that the good of the group transcends the need of an individual when it comes to structured meetings. Choose another asynchronous option for these needs whenever possible.

A valuable meeting is one where everyone attending wants to participate.

STREAMLINING IN PRACTICE:
IN-PERSON MEETINGS

MAKE MEETINGS THE OPTION OF LAST RESORT

For most people, the best meetings are the ones that never happen. Respect the schedules and commitments of your colleagues by striving to move forward with an asynchronous path. Only call for meetings when it is absolutely necessary. Your team will thank you.

PARTICIPANTS NOT ATTENDEES

Invite only those who have an active stake in the meeting topic and who you expect will contribute to the discussion. Anyone who does not meet these criteria can receive a summary after the meeting.

SHARE AHEAD

Avoid using the collective time of everyone in a meeting to simply share information.

Provide as much material and information ahead of a meeting, and expect everyone to come to the meeting prepared to discuss and share their perspectives.

KNOW WHEN TO END A MEETING

Meetings get scheduled for windows of time and end up taking up that time by default. Be prepared to end a meeting when the discussion and decisions are made — not just because the next meeting is starting.

STREAMLINING VIDEO MEETINGS

STAY FOCUSED

With the convenience of attending a meeting from your computer, it is tempting to split your attention with other distractions. Treat a video meeting exactly as you would an in-person meeting by giving your full focus and attention. When you don't, everyone else can easily tell — you're not fooling anyone.

LIGHTING 101

Make an effort to insure that your face is well lit. By turning off lighting behind you and having lights in front of you, your face will be much clearer and you can make a better connection with your colleagues. There's no point in being in a video meeting if you can't be seen clearly.

MAKE A CONNECTION

Enlarge the video of your colleagues as large as possible on your screen (full screen if possible) so that you can best emulate being together with them. Sit close to the camera so your face fills in at least 30% of the screen. When you sit back and appear small, others won't be able to connect with your facial expressions. Lastly, make an effort to look at the camera itself when you speak — this allows others to make eye contact with you while you talk.

STREAMLINING AUGMENTED CALLS

MASTER THE TECHNOLOGY

Screen-sharing software continually improves, leading to regular software updates and changing features. Invest the few minutes it takes to familiarize yourself with the latest features so that you can get the most from these calls. As a rule of thumb, always begin the process of hosting or joining a video call at least 5-minutes ahead of the scheduled start time to allow for last minute technology glitches.

SMILE, YOU'RE ON CAMERA

Most screen-sharing platforms include an option to share your webcam video along with your screen. When you include this small video of yourself along with your content, you have an opportunity to truly make a connection with your colleagues through what you are sharing: your screen + voice + video make for a powerful virtual meeting.

DON'T OVERSHARE

Be aware that sharing your screen can often mean sharing everything on your desktop. Consider what others can see and take precautions to close or hide anything that could be distracting:

BE AWARE OF PERSONAL INFORMATION IN:

Desktop wallpapers

Incoming emails

Calendar notifications

To-do lists

Open web browser tabs

Files on your desktop

STREAMLINING CONFERENCE CALLS

The following guidelines are a few helpful reminders:

MASTER MUTE

Modern phones have highly sensitive microphones which pickup even the faintest of noises. Simply shuffling papers can sound like a tornado — let alone the barking dog outside that sounds like it's on your lap. Master the art of muting yourself when you are not speaking to keep as clear a line as possible for everyone else.

SPEAKERPHONE ETIQUETTE

Make a habit of announcing your name before you speak ("This is Sabrina in Madrid…") as a courtesy to those on the call who may not know your voice. Also be conscientious of where the microphones are in the room and stay as close to them as possible. Larger rooms with multiple people quickly become difficult for off-site colleagues to parse individual voices that are farther away from the microphones.

25 MINUTES

50 MINUTES

SCHEDULE MOST MEETINGS FOR 25 MINUTES.

Allowing time between commitments reduces the lost time as colleagues switch from one meeting to the next, and shorter meetings tend to keep participants focused. Otherwise the next commit-ment will start late as people transition. Spend-ing the first 5-minutes waiting for people to gather means wasting 15% of the meeting time.

SCHEDULE LONG MEETINGS FOR 50 MINUTES.

Longer meetings come with more notes, actions and thoughts to process. Planning to end before the hour is up gives all attendees the ability to focus during and after the meeting without the pressure of their next commitment.

THE FEWER PEOPLE IN A MEETING, THE MORE GETS ACCOMPLISHED.

Less is more.

WHEN YOU'RE CONNECTING ON CAMERA, BEHAVE AS YOU WOULD IN PERSON.

Look your audience in the eye and speak directly to them. Give your full attention or stay off camera.

USE THE LOWEST COMMON DENOMINATOR FOR MEETING TECHNOLOGY.

Only require technology in which all team members are proficient. New platforms have a way of complicating and not simplifying the connections.

ALWAYS SEND AHEAD ANYTHING THAT WILL BE SHARED IN A MEETING.

Allow attendees to review and digest information. Expect participants to come prepared to discuss and ask questions rather than you spend the meeting sharing.

FUNDAMENTALS FOR

DOCUMENTS

What did she say again? Two days into his new role and Daniel was struggling to keep track of it all. He had already interrupted his boss three times that morning — if only the process was documented...

Emma was horrified. She had sent the wrong pro-posal to a top new prospect. She had accidentally attached a proposal created for a different client. How had this happened?

Marco's head was starting to hurt — the maze of figures in this spreadsheet wasn't making any sense. What were they trying to communicate?

Are documents an effective part of your toolbox or are they slowing you down?

FOR THE RECORD

CASE STUDY: WRAP MOGUL

JR and his brother Kyle started their first burrito shop while they were in college, creating a passionate following for their quirky wraps with playful names. Just a few years later, their Wrap Mogul chain had grown to 37 locations throughout Texas and Oklahoma.

JR loved the numbers side of the business while Kyle focused on the food and service. Every month, JR sent out an email to all of the store managers and senior management team filled with insights and data that painted a picture of the businesses strengths, challenges & opportunities. His emails included spreadsheets, charts, and notes that he assembled under the subject line "FOR THE RE-CORD", which all of the team knew to expect by the 5th of each month.

The goal of JR's email was to share trends and insights with their team to both inspire and challenge his managers to improve each store. Over the years, the depth and scope of these emails had grown as the data became more dense and the commentary grew longer. What started out as a quick recap each month had grown into a serious research project.

JR felt it was time to turn this project over to their new analyst Katie who enjoyed the number crunching as much as he did - but she also had a knack for streamlining communication.

WHAT WAS WORKING AND WHAT WASN'T

The first thing Katie did was talk to a number of managers about the For The Record messages. She quickly saw a theme in the feedback she was getting.

TL;DR

The emails had grown to include so many spread-sheets, links and new ideas that most of the managers had started to dread their arrival. A few even admitted that while they had every intention of reading them later, the truth was they had multiple monthly updates still unread in their inboxes. The messages were simply *too long* and they *didn't read* them (TL;DR).

NOT GETTING ATTACHED

Another issue the managers had with the emails was sorting thru the spreadsheets and attachments included each month. While they knew these had valuable information in them, the managers simply didn't have the time to open and review all of them – and then file them for reference later. The manag-ers' schedules were so focused on their employees and store operations that the time to study the data was a luxury they simply couldn't afford.

EVERYTHING CAN'T BE IMPORTANT

And finally, JR was so passionate about sharing new ideas and resources that the sheer volume of these made it difficult for the managers to discern what was truly important. Finding the nuggets of wisdom became a chore that was easily postponed when the emails arrived.

STREAMLINING FOR THE RECORD

Katie was inspired by what she learned and knew that she could turn *For The Record* into a more effective tool for the Wrap Moguls.

SUMMARY REPORT

Katie's first change was to turn the emails into a monthly *For The Record* report. Instead of a collection of spreadsheets and notes, the report was now a single document that integrated the spreadsheets, graphs and commentary across a few pages she formatted in a Word document. This report became an actual record filed monthly and could be easily distribute as needed.

STREAMLINED EMAIL

The real shift came in her reformatting of the monthly email. What before was a lengthy collection of ideas and notes now morphed into a highlights summary she called 3/2/1. Katie intentionally limited the monthly message to 6-highlights:

> 3 INSIGHTS – The ideas & inspiration

> 2 TRENDS – The data

> 1 OPPORTUNITY – The one key change to consider

Beyond this, she did not include any attachments, but rather a sole link to the monthly report which could be viewed online. This new format meant that the emails returned to being a messaging platform delivering the right amount of information for a manager to take in quickly.

BUILDING A REFERENCE LIBRARY

By moving the report out of the email and into the cloud, Katie was able to quickly build a reference library of data and insights which all of the managers and senior team could access whenever they wanted. By having these reports in a central location, the team could now review multiple months worth of data and trends at times when they were ready and able to focus.

FROM IGNORING TO ENGAGING

The changes Katie made led to a tremendous shift in engagement between JR and his managers. Where before the emails would go unread because of their depth, the new 3/2/1 format meant all of the recipients knew what to expect when the *For The Record* appeared in their inbox. With less to consider, the managers were far more interested.

For JR the impact was powerful. At the end of each of the new emails he posed a single question around the one opportunity he saw for the company – and invited the managers to share their thoughts: Reply All if they wanted all of the managers to discuss, or simply reply to JR if they wanted to share something directly. The conversations flowed. JR found himself connecting with his managers more often as they wanted to be part of *The Record.*

WHEN WE CONCENTRATE ON WHAT IS TRULY IMPORTANT, LESS BECOMES MORE EFFECTIVE.

FOR THE RECORD - November 4th

Moguls -
October was a scary good month for all of our locations –the hits just keep coming!

3 INSIGHTS
> November typically shows a +17% increase in Turkey wraps - be sure to rebalance your meat orders in the coming weeks.

> Get your holiday staffing calendar out by the 10th this month - you can expect 3x vacation requests thru the end of the year!

> The stores that participated in our test of the local alternative sodas kept pace with those selling the Coke products - we will discuss the possible transition at our Dec. meeting.

2 TRENDS
> Our Veggie menu out-sold the Classics for the first time since its introduction

> Our average ticket grew by $0.33 year-over-year to $7.41. Great work by the FOH staff – Let's keep it up!

1 OPPORTUNITY
> Store 9 (Brenda) tested the updated POS and found it was an easy update - she recommends all stored do it ASAP.

AND THE QUESTION
> We have an opportunity to open a micro-location at the DFW airport. What should our limited menu include?

That's a wrap! @JR

Visit the On The Record page for the full report HERE.

STREAMLINING DOCUMENTS

SET IN STONE

Where meetings and calls are the mortar of business communication, documents are the bricks. Documents allow us to take the ideas, discussions and decisions of everyday interactions and preserve them in a format that is designed to last. Documents are the foundation for business communication.

DOCUMENT

noun

A piece of written, printed, or electronic matter that provides information or that serves as an official record.

verb

To record something in written, photographic or other long-lasting form.

Documents give us the ability to freeze and capture information at a particular moment in time. Without them, communication would be full of ambiguity — not clarity.

DOCUMENTS ARE THE RECORDS OF IDEAS, INFORMATION AND DECISIONS THAT ALLOW BUSINESS TO GET DONE.

MESSAGES VS. DOCUMENTS

The line between these two very different pieces of communication has become blurred in our digital culture. We see messages (like emails) utilized to capture information for future use, and documents created when a conversation would be far more ef–fective. For example, when providing feedback on a project.

Recognizing and understanding the difference between messages and documents goes a long way toward using each appropriately.

MESSAGES

DYNAMIC

Messages are designed for engagement

FOCUSED AUDIENCE

Messages are targeted at a focused audience

ONE-TIME USE

Messages are transitory and designed for momentary use

DOCUMENTS

STATIC

Documents are designed to freeze information at a moment in time

BROAD AUDIENCE

Documents are designed for a broad, and oftentimes, undefined audience

REUSE

Documents are designed for use multiple times in multiple situations

SYMBIOSIS

The relationship between messages and docu-
ments is symbiotic — they both rely on and benefit
from the other. Documents almost always are ac-
companied by a message that explains the context
and highlights their value. Once introduced, the
documents can stand on their own. Consider some
common examples:

DOCUMENT	+	MESSAGE
Resume	+	Cover letter
Attached File	+	Email
Report	+	Meeting discussion

All of these documents are made stronger with the
framing provided by the accompanying message.
Streamlining embraces the strengths of each com-
munication component and practices using them
together.

WHEN MESSAGES AND DOCUMENTS ARE
USED TOGETHER SMARTLY, COMMUNICATION
BECOMES MORE EFFICIENT AND EFFECTIVE.

UNDERSTANDING COMMON DOCUMENT TYPES

WRITTEN DOCUMENTS

The most common type of information.

Excellent for conveying depth & detail.

Tools like Word, Pages and Google Docs.

A basic skill level is needed to create effective documents.

VISUAL DOCUMENTS

Charts, graphs, illustrations and photos.

Effective for conveying concepts and conclusions.

Tools like stock photography, charting software.

Requires a trained eye to craft strong documents.

DATA DOCUMENTS

Numbers and figures — very valuable modern information.

Powerful for organizing and analyzing.

Tools like Excel, Numbers and Google Sheets.

Specialized skills are required to create valuable documents.

STORYTELLING DOCUMENTS

Mixing words + data + visuals in a single document.

An important tool for delivering messages that have impact.

Tools like PowerPoint, Keynote and InDesign.

Requires a talent to craft powerful documents.

IF ALL YOU HAVE IS A HAMMER,
EVERY PROBLEM LOOKS LIKE A NAIL.

OUR FAVORITE HAMMER

Despite the rich opportunity to know how to use a variety of tools for communication, many of us tend to rely on only one or two tools to create all of our documents. By using our favorite "hammer" every day, we may become proficient with it, but we are missing opportunities to use more appropriate solutions.

A DEEPER TOOLKIT

When we invest the time to become proficient with more tools, the return on that investment can be exponential. Each tool has a way of magnifying our skills and creating efficiencies that translate into stronger and richer communication.

CREATING DOCUMENTS THAT MAKE AN IMPACT IS KEY TO GIVING OUR IDEAS MOMENTUM.

FOCUSED COMMUNICATION:
DOCUMENTS

We can apply the principles of Focused Communication to every document we create. Once we have defined our IDEA, a clear path can be created to meet our OBJECTIVE.

IDEA — AUDIENCE — MESSAGE — TECHNIQUE — ACTION — OBJECTIVE
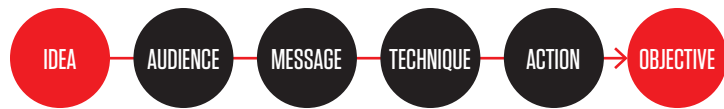
AUDIENCE

THE RIGHT DOCUMENT FOR THE AUDIENCE

The aim of our communication is to make an impact on our audience. When we look at this objective through their eyes, we will sometimes see that the right document for them is different from the document we may want to create. For instance, an audience focused on the numbers needs a different document than a highly visual audience. The audience and objective determine the proper tool.

MESSAGE

MAKE THE MESSAGE OBVIOUS

Many documents become dense with information and commentary, leaving the message lost in the mix. When you make the message the center of your document — presented clearly and upfront — everything else you include has a clear role to play in supporting your message.

TECHNIQUE

LEVERAGE DOCUMENT STRENGTHS

Each document type has its inherent strengths and weaknesses. Data documents are excellent tools for conveying facts and comparisons while written documents can better present depth and details. Along with considering the audience, selecting the right document format can streamline the message you aim to convey.

The ACTION for many documents is simply that information be transferred to and stored for the AUDIENCE. The OBJECTIVE then is to convey this information as clearly as possible.

POWERFUL WRITTEN DOCUMENTS

THOUGHTFUL ORGANIZATION

Written documents can quickly become dense with information and appear overwhelming to read. By taking time to organize and present the information from most to least important, you greatly increase the likelihood that your message will be clear and understood. Remember the BLUF strategy: Bottom Line Up Front.

CLEAR HIERARCHY

Include headlines and distinct titles for topics to give your audience a quick reference to what they can expect from each section. Well-crafted titles and headlines can convey the bulk of your message to your audience from simply scanning these. These mile-markers in your text allow your audience to quickly focus on what is important to them.

FEWER WORDS. MORE IMPACT.

Practice conveying your message with as few words as possible to dramatically elevate their importance to the reader.

HEXXIS GAME TESTING

Focus Group Report

April 26, 2016 | Laura Judge

SUMMARY

10 casual gamers were asked to play HEXXIS for 30 minutes each, then interviewed as a group about their gameplay experience. The resounding response was extremely positive.

> 8 of the 10 players were willing to purchase the game for $3.99.
> 6 players knew friends or family that they thought would like the game
> All of the players were able to complete the first level within 90 seconds
> 5 of the players were willing to pay 99¢ to upgrade to the Pro version

INTERVIEW HIGHLIGHTS

"The graphics are very cool. It looks very simple but it quickly gets difficult - which makes for a fun challenge."

"I found myself humming the songs for each level. I'd love to get the soundtrack."

"If I could play against my friends in real-time - that would be amazing."

"It's like Tetris meets Words with Friends. Simple but complicated at the same time."

TOP CONCERNS

3 areas of concern were mentioned by multiple players. These represent opportunities for improvement ahead of the final release:

> The power-up was hard to find - needs to be more obvious
> The level scoring did not make sense to most players.
> The level speeds increase too fast. A more gradual change will help

A detailed report will follow.

###

POWERFUL DATA DOCUMENTS

IT'S ABOUT THE NUMBERS, NOT THE CELLS

Most spreadsheets are presented in a grid, with the data competing for attention with the cell frames. While the grid is helpful for organizing, it can be very distracting when reading the data. Hide the grid and let the data create the structure for the columns and rows.

USE SIZE & WEIGHT FOR EMPHASIS

Data that should be highlighted for your viewer can be emphasized by changing the weight, size or color of the numbers. Adjusting the numbers themselves in place of coloring the cell, keeps the focus on the data.

HIDE ANCILLARY DATA

While a complex and dense amount of data may be needed to calculate your results, only some of that data is necessary for your audience to understand the conclusions. Hide as much data as possible that is not relevant to the message you want to convey. This information will still be available if needed but not distracting your audience from the key message.

HEXXIS GAME BUDGET

	BUDGET	ACTUAL	DIFFERENCE
DESIGN	$ 150,000	$ 197,000	$ (47,000)
Game Design	$ 100,000	$ 144,000	
Web Design	$ 25,000	$ 22,000	
Marketing Design	$ 25,000	$ 31,000	
DEVELOPMENT	$ 700,000	$ 823,000	$ (123,000)
iOS Dev	$ 300,000	$ 410,000	
Android Dev	$ 350,000	$ 325,000	
Back-End Dev	$ 50,000	$ 88,000	
QA / TESTING	$ 130,000	$ 98,000	$ 32,000
iOS QA	$ 50,000	$ 40,000	
Android QA	$ 60,000	$ 35,000	
Logic Testing	$ 20,000	$ 23,000	
MARKETING	$ 270,000	$ 212,000	$ 58,000
US Marketing	$ 80,000	$ 40,000	
European Marketing	$ 80,000	$ 60,000	
Japan Marketing	$ 60,000	$ 42,000	
Other Marketing	$ 50,000	$ 70,000	
OVERHEAD	$ 750,000	$ 795,000	$ (45,000)
Admin Salaries	$ 245,000	$ 220,000	
Support Salaries	$ 165,000	$ 190,000	
Studio – Boulder	$ 190,000	$ 205,000	
Studio – Hyderabad	$ 85,000	$ 70,000	
Operations	$ 65,000	$ 110,000	
TOTALS	**$2,000,000**	**$ 2,125,000**	**$(125,000)**

POWERFUL VISUAL DOCUMENTS

CHARTS ARE IMAGES

Whenever possible, use a chart or graph to illustrate data analysis and results. A powerful chart is worth a thousand data points.

IMAGES CREATE FEELINGS

Use images in documents to convey concepts. Images can express ideas quickly and leave a lasting impression. Use images that are intriguing and unexpected to make an even stronger impression.

AVOID CLICHÉS

Using traditional clip-art or common stock photography images can work against your intent. These types of images have become expected and so common-place that they suggest that your message is unoriginal. Look for new ways to express concepts to create original connections for your audience.

OUR MARKET
Millions of Mobile Gamers

2012 2013 2014 2015 2016

HEXXIS. elegant complexity
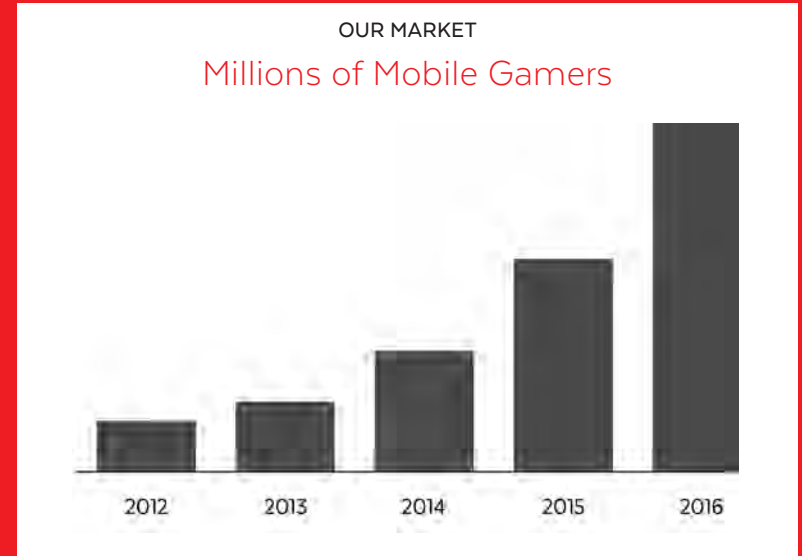
POWERFUL STORY DOCUMENTS

STORYTELLING

Telling stories is one of the most effective ways to make a strong impact on your audience. A good story will have a start, middle and end that takes your audience on a trip that they can relate to. When you can tell a story that connects with your audience, you give your ideas the best chance of staying with them.

FROM DECKS TO STORYBOOKS

Instead of assembling a series of slides, consider creating a storybook. By outlining the story you want to share, each page can then focus on moving the story forward. When you can tell the story in person to your audience, the pages become the illustrations to your tale. Aspire to moving your audience with your imagination and delivery.

Beginning

Middle

End

COLLABORATING ON DOCUMENTS

Collaborating on documents with a team requires a conscious effort to streamline the process. The first step is to understand and agree on the process in advance. With a transparent process and approach, everyone participating can stay focused on what they are contributing.

COLLABORATION WORKFLOW

1 OUTLINE
An outline of the document is created and agreed upon.

2 WRITTEN DRAFT
An initial draft of the content in text is crafted for comment.

3 FINAL CONTENT
A final version of the text and additional content is accepted.

4 LAYOUT
The document is formatted and designed.

5 REVIEW
The document is reviewed, edited and approved.

6 DISTRIBUTION
A final version is created for distribution as a PDF.

ONE VERSION TO RULE THEM ALL

The advent of cloud storage solutions has made it convenient and simple to collaborate on documents across teams, no matter where in the world each member might be. Instead of the old-fashioned method of creating versions, distributing those versions and reconciling comments from each individual, a single, central document is used. Most modern software incorporates automatic version history and change-tracking, allowing a single document to be saved in the cloud and worked on collaboratively without need for distributing copies.

SHARING FINISHED DOCUMENTS

When documents are finalized, it's important to freeze them in their final form so further changes are not made unintentionally. These final versions are then ready for sharing and distribution with confidence that everyone will be seeing the same version.

THE PDF IS FOR EVERYONE

The Portable Document Format (PDF) was designed to allow documents to be saved and shared in a format that ensures everyone will see the exact same thing. The PDF eliminates issues with how documents appear on different platforms, where different fonts, screen resolutions and other factors can make native document files appear differently. PDFs are generally unable to be edited or changed, making this format ideal for packaging all final document versions. All modern document creation software includes an option to save a PDF of your documents.

DOCUMENT SECURITY

Another important reason to only distribute final documents in PDF format is for security. If we distribute final documents in native formats (Word, Excel or PowerPoint) these documents can be easily edited and changed in ways that can confuse or disrupt the original intent. For example, sending a 3-page non-disclosure agreement to a partner in an editable format could allow for subtle changes to be made and never noticed when the signed document is returned.

Avoid the potential for unintended changes by sharing only PDFs which are not easily edited.

DISTRIBUTING

Cloud storage platforms also make it convenient and efficient to distribute these PDFs. Instead of sending copies throughout your network, share a link to the document stored in the cloud where anyone can access and view it without needing to make a local copy of their own. With this approach, updating the document becomes as easy as updating the file in the cloud, and anyone with access to it will immediately have the new version available.

ALWAYS DISTRIBUTE FINAL DOCUMENTS IN PDF FORMAT.

PDFs ensure the content of your document is not easily changed and allows anyone to open the document on any device.

ALL DOCUMENTS BEGIN AS A WRITTEN OUTLINE.

A written outline is the most efficient way to define your objectives, audience, message and actions. Refinement and agreement on the outline make the process of creating any document smoother.

FUNDAMENTALS FOR

PRESENTATIONS

Ted hadn't had much time to prepare for his presentation — but he didn't let that shake his confidence. Besides, if he forgot what he wanted to say it was up there word-for-word on his slides.

Amy was frantic — she was only halfway through her slides with 5-minutes to go. Where had the time gone?

"We'll get back to you," said the client, stifling a yawn. Joan knew what that meant. But she didn't understand what they could have done differently — everything had been described in such detail on their 80-slide deck.

Have you ever listened to a presentation like this?

Have you ever given a presentation like this?

MAKING A STRONG IMPRESSION

CASE STUDY: JOULE TALENT DEVELOPMENT

Laura's company Joule Talent Development leads training programs for companies in the energy sector. After attending a Streamline workshop, Laura committed to updating the presentations she uses when delivering her programs. The following pages illustrate the before and after of some of the slides in her presentation, accompanied by the thinking behind the changes she made.

THE POWER OF PERSONAL BRANDING

One of Joule's popular programs focuses on the power of personal branding. Laura decided this would be an excellent opportunity to apply her Streamlining insights while conveying her own brand of communication more clearly.

BEFORE
The slides contain numerous elements that don't add to Laura's message. All of the borders, logos, bullets and textures get in the way of the message.

AFTER
Once she removes the unnecessary elements, Laura focuses on telling her audience what makes a powerful brand using strong images to illustrate her message.

BEFORE
The slide contains the questions she intends to ask her audience along with details that distract from the point she wants to make.

AFTER
By focusing on the contrast between the two CEOs, Laura can now keep her audience focused on the story she is telling - the authenticity of personal brands.

BEFORE
The paragraphs of text and multiple questions invite the audience to read ahead – making it difficult for them to listen and focus on what Laura is saying.
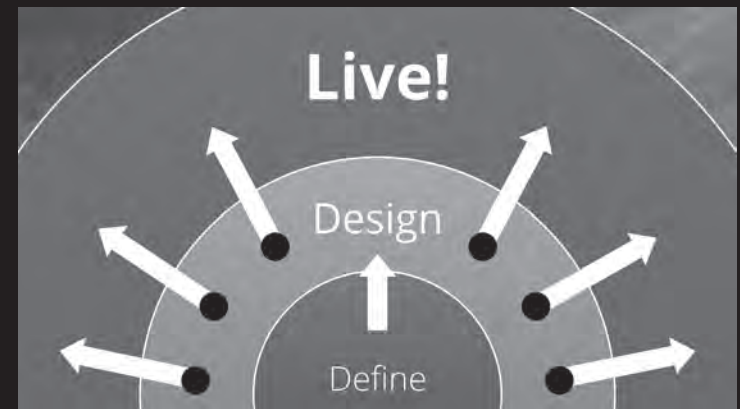
AFTER
By simplifying the presentation of the story, Laura's streamlined slide becomes more memorable and the story she tells to accompany this becomes the focus of her audience.

PRESENTING THE PRESENTATION

After streamlining her slides, Laura found that her presentations became much more fluid and personal. In removing the rigid text and many distractions throughout the deck, she freed herself from the confines of the structure and found she could focus on making her message more personal.

PERSONAL WORDS ARE MORE MEMORABLE THAN A THOUSAND SLIDES.

MAKE AN IMPACT

The act of sharing information can become an art form when we invest in our presentation. Whether we are sharing a gift or information, it is important to set the stage for our audience — signal to them that we believe we have something special to give.

When we believe what we are sharing is unique and valuable, our presentation should reflect this as well.

UNDERSTANDING PRESENTATIONS

TALKS

When an individual presents a talk, they are typically making an address to an audience without feedback from or engagement with the audience. Talks are primarily one-way sharing. Modern talks (like TED talks or a keynote address) often include slides that can be powerful tools for the presenter.

MEETINGS

Meetings often include presentations in which information is shared and discussions take place. For these, the presentation serves as the outline for the discussion, which is expected to be engaging and collaborative. Modern meeting and conference rooms are designed to facilitate these presentation-led gatherings.

CONVERSATIONS

Presentations have even found their way into one-on-one conversations, where slides become cue-cards designed to drive the discussion. Pitching an idea to a person in today's business environment has become synonymous with presenting a slide deck instead of a simple discussion.

All three types of presentation share some things in common:

The speaker and audience are in the same place together.
The slides serve to support what the speaker is saying.
The speaker is responsible for dynamically presenting the message – not the slides.

A PRESENTATION THAT IS NOT PRESENTED IS JUST A DOCUMENT.

The act of creating a presentation has been confused with the art of presenting. The success of any presentation lies with the speaker's ability to connect the information to the audience. When we remove this dynamic, the chance of making an impact is severely compromised.

COMPROMISE

Unfortunately, it has become increasingly common to forgo this connection in the interest of distributing ideas on their own and without the context a presenter provides. This has led to the creation of "presentations" that are never truly presented, only shared.
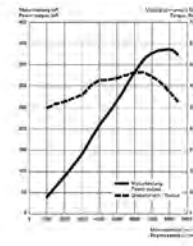
LESS IS MORE.

Focuses on details.

Focuses on the story.

ANATOMY OF A PRESENTATION

70% WHAT WE SAY

The most memorable part of our presenta–
tion is what we say and how we say it.
Our ability to explain details and make a
connection to our ideas cannot be
captured on a slide.

20% WHAT WE SHOW

Our slide serves to support what we say by
anchoring the audience's attention on a
single big idea. Powerful visuals and bold
statements reinforce the importance of
our key message.

10% WHAT WE SHARE

Providing your audience with details and
supporting information is best handled in a
format they can take with them or annotate.
Providing notes to your audience insures
everyone leaves with the same message.

WHAT WE SAY: BEST PRACTICES

NOTES, NOT A SCRIPT

Creating speaker notes for yourself will give you the sequence and highlights you want to include with each slide. Never try to write a script or exact wording for sentences. Always rely on your natural and personal delivery style based on your notes alone.

LISTEN TO CONNECT

When you listen and pay attention to your audience, you can get a sense of what is connecting and what is not. Where there is uncertainty, you can add more depth or try a different approach. When things are resonating, you can move on with confidence.

ENGAGE & INTERACT

Whenever you can interact with your audience — asking questions, looking for agreement or feedback — you draw them into the ideas. The less of a barrier you create between you and your audience, the less of a barrier there will be to your ideas.

SUNLIGHT IN **17** SECONDS

AUDI R8 SPIDER

> Exciting new model
> Best convertible we've ever built
> Maintains 4-star safety rating
> Over 225 improvements
> Just one highlight:
> Top down in 17 seconds!
> Full specs in your handout

Slide + speaker notes

WHAT WE SHOW: BEST PRACTICES

FOCUS ON THE KEY CONCEPT

A powerful slide makes the key concept or point you are making obvious and clear. Your audience should not have to parse or interpret exactly what the message and take-away is. You simply show it.

STRONG IMAGERY

Strong, effective images can create connections and generate feelings in your audience far easier than any words you can write. Whether you use graphs, illustrations or photos, one per page makes the strongest impression.

MINIMAL TEXT

Less words make more impact. Aim for no more than 15 words total on any one slide. Also avoid sentences which your audience will feel compelled to read. Use simple phrases or individual words to ensure your audience will be listening to what you say and not reading your slides.

WHAT WE SHARE: BEST PRACTICES

NOT THE SLIDE DECK

If your slides were created with the appropriate amount of content, they will have little value without you presenting them. Instead, create a separate document with notes to accompany the deck which can stand on its own.

PROVIDE DEPTH & DETAIL

Along with the notes, your document can provide further depth in areas you could not cover in person as well as specifics that were not presented. This extra information builds on the message you shared by giving further context for moving your ideas forward.

FOR REFERENCE

Your document becomes a reference which stands on its own. Your message, information and support are all self-contained and can be shared and reviewed without you presenting it. Taken together with what you show and say in your presentation, you will deliver a more powerful message.

A COMPLETE PRESENTATION SUITE

SAY

Your speaker notes + your delivery

SHOW

Powerful slides, each with a single key message

SHARE

Your support document, providing notes to your audience.

LESS IS MORE.

LIKE A GLOVE.

Slides

AUDI R8 SPIDER

> Exciting new model
> Best convertible we've ever built
> Maintains 4-star safety rating
> Over 225 improvements
> Just one highlight:
> Top down in 17 seconds!
> Full specs in your handout

Speaker notes

Handout

WITHOUT A PRESENTER, A PRESENTATION TELLS A POOR STORY.

A good presentation includes the imagery and essence of your story, with your words filling in the details. A presentation sent on its own only carries a fraction of the message.

USE STATEMENTS NOT SENTENCES TO KEEP YOUR MESSAGE CONCISE.

When you present, you speak and share in full sentences. The slides are summaries of the concepts, not a script.

USE AS FEW SLIDES AS POSSIBLE. LESS SLIDES CREATE MORE ATTENTION.

Take 100 and divide by your number of slides to calculate the percentage of attention each slide will receive. 5 slides means each get 20%. 50 slides...only 2%.

SLIDES SHOULD ILLUSTRATE WHAT YOU ARE SAYING.

Powerful slides illustrate and summarize the most important point you are making. They are your backup band while you are the star.

THE WAY

FOCUSED COMMUNICATION

The principles of Focused Communication and Streamlining all lead us to the same place.

THE LESS COMPLEX OUR COMMUNICATION, THE MORE POWERFUL OUR MESSAGE.

Where MORE is the common route, LESS is the more elegant way.

IDEA — AUDIENCE — MESSAGE — TECHNIQUE — ACTION → OBJECTIVE

Taking this road less traveled,
our compass keeps us
focused on our destination.

The success of
communication can
only be measured
by the impact it makes.

After everything is
said & done,
when less is said,
more is done.

道

GLOSSARY

BLUF
BOTTOM LINE UP FRONT
A reminder to always lead communication with the most relevant conclusion or decision.

BTT
BACK TO TOPIC
A helpful guidepost for messages and threads that have strayed from their original intent.

COB
CLOSE OF BUSINESS
Sometimes interchnaged with EOD (End of Day), this acronym relates the concept of timing without needing to specify a time in our world of distributed teams.

EOM
END OF MESSAGE
A simple courtesy to indicate the completion of a message – typically appended to short messages so there is no confusion by the audience that the brief message is complete.

NNTR
NO NEED TO REPLY
A courtesy indication that the writer is not expecting a reply. NNTR is a powerful way to end reply loops and avoid unnecessary confirmations.

TL;DR
TOO LONG; DIDN'T READ
Sometimes pronounced "teal deer", this notation informs the sender that the reader found the content too dense and she did not spend the time to parse it for the intended message.

TS;DU
TOO SHORT; DIDN'T UNDERSTAND
The counterpoint to TL;DR, this notation informs the sender that more context or clarity is needed to fully understand the message.

THE AUTHORS

JASON A. FRANZEN
Co-Founder of Streamline Certified

Founder of More Simple
MoreSimple.com

STEPHAN M. MARDYKS
Co-Founder of Streamline Certified

Co-CEO & Co-Founder of
SMCOV | SMCOV.com
Trap Tales | TrapTales.com
Wisdom Destinations | WisdomDestinations.com

Managing Partner of ThomasLeland
ThomasLeland.com

DAVID M.R. COVEY
Co-Founder of Streamline Certified

Co-CEO & Co-Founder of
SMCOV | SMCOV.com
Trap Tales | TrapTales.com
Wisdom Destinations | WisdomDestinations.com

Managing Partner of ThomasLeland
ThomasLeland.com

SINCERE APPRECIATION

Heartfelt thanks to our wives Laura, Marie-Genet and

Pamelyn and our families for their continual support of our

passion for streamlining.

Special thanks to Joseph Alan Wachs and

David Westley Covey for their thoughtful contributions.

Our admiration to David Allen for inspiring us

with *Getting Things Done* and for his foreword to our book.

COLOPHON

DESIGN

Book design and layout by Jason Alan Franzen

This book is set in Texta type from Latinotype foundry and Tungsten type from Hoefler & Co.

Photos are from the Shutterstock library and the author's collection.

STREAMLINE CERTIFIED PROGRAMS

Streamline Certified offers a suite of training programs for in-person and on-line adoption of streamlining principles and best practices.

WORKSHOPS FOR LEADERS & INDIVIDUALS

Streamlined training introduces the art and power of a culture streamlining communication - for leaders and today's emerging talent.

CONSULTING

Streamline Certified offers custom solutions for organizations of all sizes –designing a program that get your team or company streamlined in no time.

To learn more, visit:

StreamlineCertified.com

The Streamlined series offers a continuum of insight and application of the principles of focus and simplicity in modern communication.

LESS & MORE
THE ART OF SAYING MORE WITH LESS

SAID & DONE
THE POWER OF SAYING MORE WITH LESS

Complete your collection or share a book with your colleagues at StreamlineCertified.com

The simplest things are often the truest.

– RICHARD BACH