Chapter 10

Writing to Persuade, Part 2

Creating Successful Business Documents

LEARN HOW TO . . .

- Write long-form business documents
- Create an executive summary (ES)
- Prepare a report
- Write formal and conversational proposals
- Write grant applications

> *When dealing with people, remember you are not dealing with creatures of logic, but with creatures of emotion.*
>
> —Dale Carnegie

Now or in the future you may work for yourself, a company, nonprofit, or government agency. It's probable that you'll move among these spheres during your career. Even if you keep to one domain, most communication tools are common to all.

Reports are universally needed because accountability matters on every level. As organizations become more geographically scattered and personal contact diminishes, they become even more important. Proposals and applications are not just for business owners—they're part of the day's work for many people. Staff members in many organizations must compete for assignments they want and make their best case for higher positions.

If you're entering the business world, here is some useful advice: Think and act like an entrepreneur. This means not just doing your job but doing it within the larger perspective of the organization's challenges and goals. Take personal responsibility to understand and advance company interests. Find opportunities to contribute and improve how things are done. Of course, use your top writing and speaking skills to let people know you're an active contributor and promote your ideas. Writing good proposals and reports will earn you support for your in-house projects and win outside contracts when that's part of your role.

All these materials must be persuasive, whatever the goal. To amplify the techniques of persuasion explained in Chapter 9, this chapter gives you a more specific resource of ideas to draw upon in writing major business documents. Each writing challenge is different, and only a handful can be covered here. But if you practice the thinking structure covered in earlier chapters and build up your repertoire of effective techniques, your business documents will help you stand out.

WRITING TIPS FOR BUSINESS DOCUMENTS

As different as the various business formats are, as well as their subject matter, the writing style is similar for all. These guidelines, which are detailed in previous sections, are important to business documents:

- Write crisp, simply constructed sentences that read fast.
- Use an objective third person tone and relatively formal language that is still accessible and clear.
- Choose short, vivid, concrete words, and avoid jargon and clichés.
- Choose action verbs rather than dull, passive-sounding ones.
- Maintain an upbeat, positive, "in charge" tone that communicates good judgment and conviction.
- Avoid hedgy words and statements (e.g., *about, we hope that, we'll aim to,* or *it's possible that*).
- Write a strong lead plus informational headlines and subheads to attract and retain the readers you want.

Check that the copy is sayable—read sections aloud and to friends. Some advisers suggest reading portions to a teenager to see how easily the document can be understood and what questions come up.

Expect to edit through a series of revision cycles. If your first draft (or two) is too long, as it probably will be, look for redundancies in thought and word. Cut empty phrases as well as unsubstantiated hyperbole to tighten the writing. Eagle-eye any vagueness and boilerplate-style material that is not completely customized to the occasion—readers find the one-size-fits-all approach insulting. Sharpen language. Polish, polish, polish. But don't edit the life out of it.

And don't allow the technical challenge of creating a major business document to overshadow your message. You must know what it is—be able to state it in a few sentences—and stick to it throughout. Everything included must support, prove, or demonstrate the truth and relevance of your message.

For best results, steep yourself in your own conviction and the excitement (or need) that drove you to prepare the document. Write from inside your own commitment. But at the same time, remember that it's not about you—especially with proposals, immersion in the audience perspective is a must. Invest in understanding your target readers and the problems they want to solve, whether you're preparing the document for your boss or a client or the public.

You cannot manipulate language to cover a lack of basic understanding or knowledge.

Logically examined, each project will suggest what to include. You might plan a long message similarly to a short one—shape a beginning (reason for the project, why the reader should care, definitions, orientation to the subject), middle (technical material, evidence, research, details), and end (a strong conclusion that brings the content and bottom-line recommendations home to the intended reader). A long document also requires a table of contents, ES, and, often, an appendix, where you can stash the backup without distracting readers from your story line.

SUCCESS TIP

USE A FOLDER SYSTEM TO JUMP-START BIG PROJECTS

When a major writing project looms, ease your path by collecting ideas, thoughts, and resources in file folders, either real or virtual—or both. (If you use paper folders, note that colorful ones are better than plain manila. You can color-code by subject.) If you're working on a business proposal and your outline has 10 sections, make up 10 folders. Then, as random useful thoughts come to you, write them up and put them in the applicable folders. Do the same with materials like financial statements.

If you've allowed reasonable time for the project, you'll end up with a batch of ideas and information for every topic. The writing will feel less formidable, and you'll have good material right at hand. The system also keeps you organized. Best of all, this simple collect-as-you-go method builds your thinking much more forcefully than if you sit down and try to create the document from scratch, all at once.

You can also use online systems to organize, such as Evernote or Scrivener.

THE EXECUTIVE SUMMARY: TECHNIQUES AND OPTIONS

The ES is a critical element for many kinds of business materials: business plans, proposals, white papers, reports, grant applications and more. The busier everyone gets, the more vital a role the summary plays. In many cases, it will be the only part of the document your key audiences read. If they like it, they may read the rest—or take action based on the ES alone.

So leave plenty of time to develop this piece. Don't pull out excerpts from the full document and tack them together. Use the ES to tell a complete, self-contained story. In some cases, its role is to fully present your idea and recommend a course of action, supported by evidence. In other cases, it must convince readers that they need the information and that it's relevant to their interests.

Touch on every element of the whole document to put the pieces in context, but give center stage to what matters most to the reader. If you're writing a business plan for a new venture, focus the ES on communicating your idea vividly as well as why it matters and why it's viable. A research report summary should concisely relate what you did, why, how, basic results, and perhaps next steps. A proposal summary should usually identify the problem and your solution.

Use the ES to put the whole document, and therefore your subject, in perspective. It's where you tell readers what the rest of the material means and why they should care. And aim to accomplish it all in one to two pages—rarely is a longer summary called for or welcome. The rule of thumb is to limit an ES to 5% to 10% of the full document.

Marshal your writing tool kit to make the ES as interesting as you can. This is the place to recreate your own excitement as an entrepreneur ready to seize the day or as the dedicated adviser prepared with a solid, innovative recommendation for a client or boss.

VIEW FROM THE FIELD: THE EXECUTIVE SUMMARY AS INTERNAL ADVOCACY

My goal in writing an Executive Summary is generally some form of advocacy: to get my point across, to influence, to make a compelling argument that can be fully trusted. Very often your audience has limited time so it needs brevity—but the Executive Summary should also show a solid organization and logic in respect to a business issue. The most successful Executive Summaries are self-contained. You may get approval based just on the summary.

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It's good to show your audience that you know what came before and use it for context. Don't discredit it. And it's sometimes appropriate to make one recommendation but show other possibilities. This lends credibility, and people like to have a choice.

Move with gentle guidance into key findings or data points to support the recommendation, putting the most compelling ones on top. Know your audience: If you're appealing to the CFO, you may want to arrange your data points to address return on investment, cost saving and other financial aspects. Think of your audience's core responsibilities to help you plan your arguments and prioritize what you say.

Avoid flowery language and too many superlatives. I like to use language that shows an attempt at objectivity, focusing on the facts of the situation. The Executive Summary is not the time to put your heart on your sleeve. Err on the side of formality. Decision makers expect a level of seriousness when you ask for buy-in—chummy doesn't work. And accuracy is really important: It's a first impression thing. People will focus on a typo rather than your argument.

—Lisa Cuevas Shaw, vice president of Editorial and Professional Learning for Corwin, a SAGE company

SAMPLE EXECUTIVE SUMMARY FOR A REPORT

Summaries are best written after the full version of the document is drafted, but you may find it helpful to draft a preliminary version first to guide you through the development process. Just expect to rewrite it later, when your own understanding is more complete.

At that point, you may feel like you're buried in a morass of material and have lost your story line. Ideally, step away from it for at least a day or two, and then think about what settles out as significant and important. Or try the tell-it-to-someone-else method.

Find a way to lead with the idea or viewpoint or need that rises to the top. You might think of the first few sentences as an elevator speech for the document.

Here is how Towers Watson (http://www.towerswatson.com), an international consulting firm that helps organizations improve performance, led off a report a few years ago on how communication and change management connect. The purposes appear to be multiple—to demonstrate thought leadership, serve clients, impress prospects and interest media. (Just as with short, everyday messages, goal and audience should be implicit.) Notice how explicit the headline and subhead are and how carefully the reasons for reading the report are stated.

Clear Direction in a Complex World
How Top Companies Create Clarity, Confidence, and Community to Build Sustainable Performance

Change and Communication ROI Study Report

Executive Summary

In a challenging and dynamic business world, success depends on establishing a clear path to navigate through complexity. Organizations and their leaders—wherever they are around the world and whatever business environment they face—must be able to chart the right course and deliver results.

Organizations that are doing this best have leaders, managers, communication and change practices that create:

Clarity: Conveying to employees the direction of the business along with ways they can contribute to the enterprise

Confidence: Supporting development of leaders and managers to better deliver confidence, and using a disciplined process to ensure effective use of change and communication resources

Community: Building a shared experience, a sense that employees and leaders are in it together—sharing both the challenges and rewards of working.

This report describes what the companies that communicate and manage change effectively are doing and how practices compare globally. Read on to find the steps you can take to create a clear direction for your organization.

The table of contents for the 30-page report lists Key Findings, Introduction, Defining Communication and Change Effectiveness, Assessing Effectiveness and Performance, Clarity, Confidence, Community. (In a shorter report, the ES and Introduction are more likely to be integrated.) The last section—Conclusion—comes full circle to the beginning:

As we noted in the introduction, internal change managers and communicators are like guides on a whitewater river. New technology and techniques can aid in the effort to shoot the rapids. But at the core, the best guides have mastered the art of reading human behavior and the skill of judging the best moves to make when the water is roughest.

Towers Watson began this series of studies in 2003, and we remain impressed with the innovative approaches of the most effective companies and strong advocates of those that continue striving to deliver more.

Outline-Style vs. Narrative Executive Summary

You can also use an outline style for your ES. Here is the beginning of a white paper on an environmental situation targeted to the media, government officials, and civic groups. (It is shown in abbreviated form—in the full version, each bulleted item is a paragraph long.)

Craven County's Brownfields

Analysis, Recommendations, and an Action Plan

The problem: Craven County is home to 5,450 *brownfields*. These contaminated parcels of land

- pose health and environmental hazards,
- put our undeveloped land at risk,
- prevent logical economic development,
- cost the county millions in lost taxes, and
- create suffering in disadvantaged communities.

How we got here—a complex set of interrelated problems must be faced:

- Bewildering state and federal laws and confusing local regulations
- Lack of leadership: Who takes the helm?
- Lack of centralized information
- Uncertainty that makes developers reluctant to invest.
- Community resistance to change

How the campaign will be managed: Craven County Citizens for Cleanup will take a leadership role to

- develop community understanding,
- build a database of sites and data,
- advocate for more effective laws and incentives,
- serve as a clearinghouse for information and ideas, and
- provide guidance and road maps for stakeholders.

Resource needs

- Government grants
- Bond issue potential
- Citizen contribution campaign

A narrative version for this paper might, by contrast, begin like this:

> Craven County is home to 5,450 *brownfields*—contaminated parcels of land—twice the number of any other county in the state. They stand undeveloped or abandoned. Ranging from former dry cleaning shops and gas stations to industrial sites, they exist as eyesores in many communities but compel our attention for more serious reasons.

The rest of the summary follows in the same sequence as the bullet version but in narrative style with strong subheads.

Which approach is more effective? It depends on the nature of the project and audience. Technical subjects may present well with the outline format. But narrative style offers more potential to create emotional impact and tilt the reader in your direction. Here's how Warren Buffet sets the tone in his annual report to shareholders in two different years. In both, he starts a paragraph summarizing stock performance, so dear to his investors' hearts. Then:

2012:

> A number of good things happened at Berkshire last year, but let's first get the bad news out of the way.
>
> When the partnership I ran took control of Berkshire in 1965, I could never have dreamed that a year in which we had a gain of $24.1 billion would be subpar, in terms of the comparison we present on the facing page.
>
> But subpar it was. . .

2013:

> On the operating front, just about everything turned out well for us last year—in certain cases very well. Let me count the ways:
>
> We completed two large acquisitions, spending almost $18 billion to purchase all of NV Energy and a major interest in H. J. Heinz. Both companies fit us well and will be prospering a century from now . . . .

WRITING WINNING PROPOSALS, IN FORMAL AND CONVERSATIONAL STYLES

Writing leads to wealth.

—Jeffrey Gitomer, chief executive salesman,
in *Little Green Book of Getting Your Way*

Whether you're pitching for a project, contract or grant, proposals must be first rate. There just aren't many huge piles of money sitting around without a horde of applicants buzzing around, vying for a share or the chance to do the job. Lean times tempt less qualified applicants to try for every opportunity, so in many fields, competition keeps rising.

Bear in mind that with adaptation, most of the concepts apply more or less to the corporate, nonprofit and government arenas. Consultants and independent contractors also draw on the same set of tools.

Business proposals aimed at securing work of any kind may need to be formal, informal, or anywhere along the line. In creating a proposal, judge carefully according to the circumstances and context. A large company or government agency may present a formidable set of instructions and even a form to fill out. But even when your presentation is dictated by a strict format, following good writing guidelines helps you succeed. This often takes some imagination. Here are some universals.

Know your audience. Can you tell who will read the document? That may determine the level of technical detail to include and the angle to take—a CEO and COO and CFO have different interests, not to mention an engineer or HR director. Usually, however, you should assume a variety of people will review it. This is not a problem if you write with relentless clarity and simplicity that everyone will welcome.

Know your goal. As with a résumé, you want the proposal to qualify you for the next step—usually an interview. Rarely is a group hired based solely on "paper."

Know the problem the organization wants to solve—and why it's important. Read the RFP 20 times if the problem isn't stated outright and look for clues. Is a tight deadline mentioned over and over again? Are there an unusual number of checkpoints that may suggest a prior bad experience? What skills and capabilities are stressed? Read between the lines, do research, and be aware of industry trends and challenges.

Know your story—the big picture message. Try writing a brief crystallization of what you'll say in person at the next stage if your proposal reaches the "call" pile. Why are you the best choice? Answer this basic question as a guideline for the full proposal. It may evolve into a good ES.

Give them the proof. Marshal the evidence of how well you'll handle the work and deploy it as appropriate. Proof may include previous jobs, results, client roster, client testimonials, team credentials, special expertise, graphics, photos and more. If there's an issue with deadlines, or coming in on budget, include factual proof of your consistent performance.

Don't get lost in detail. Provide what is asked for, but never lose sight of the message you want your audience to hear.

Remember that people hire people. Take opportunities to get across who you are and what you care about, how the team coordinates skills and works together, any special advantages you bring, and why you're nice to work with (perhaps via testimonials). Trust me, likability counts a lot. The more enthusiastic you sound about the prospect of the work, the more magnetic you are.

Building relationships in person, by phone or e-mail as opportunity allows is the way organizations successfully compete.

And throughout, write with clear, jargon-free language based on short words, sentences, and paragraphs. I've heard proposal advisers claim that a pitch for big money from a big company should be written in big language: a weighty, formal, impressive, fancy-word style commensurate (their word, not mine!) with the value of the prize. I believe that's absurd. Your substance must be solid, but aim to be a breath of fresh air in how you present. I don't promise you'll win all the time—just more often.

VIEW FROM THE FIELD: PROPOSALS FOR PRIVATE VS. GOVERNMENT SECTORS

It rings true in both the private and public sectors: Always know your audience! For business proposals, focus not on you so much as on the clients. You need to really know them, what they're thinking, and what their true objective is (besides revenue). Here's what I found works with engineering proposals, for example.

First, look at all the hot buttons mentioned in the RFP. Repeat them throughout, and incorporate them into the cover letter. If the RFP says, "Here are our goals and what we hope to achieve from this project," great. If not—dig a little, interview key stakeholders and research the project's history.

Establish a theme for the entire proposal. For example, if it's a redevelopment project and the main goal is to create jobs, our theme would be economic development and we would carry it through the captions, images, and photographs in addition to the cover letter and technical scope section.

The proposal must read well and easily flow between focus areas. Use an active voice, keep sentence length to 15 words or less, be positive, and remove unnecessary words. Write it so that someone outside of the "engineering world" can review it and understand it. Proposals are often reviewed by committees that include members of the broader community; therefore, they must be understood by the layman. Appealing graphics are an extremely important component of the proposal. Use them to engage the reader. Remember, the goal is to pass the first stage and get an interview!

For government grants, such as the National Science Foundation proposals I manage, it is the quality and promise of the proposed research that is the focal point and probably accounts for

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80% of the scoring. The project summary is most important. It includes character limitations and requires details about the broad impact of the research—its intellectual merit and how it will affect the community and world at large. The emphasis is still on the story that appears in the form of a project description. A technical committee will review the proposal, but it must be understood by nontechnical people, since the award notices and the entire process are in the public domain.

—Christine M. Cesaria, director of grants/communications,
Department of Computer Science, Stony Brook University;
former marketing production manager for engineering firms

A COVER LETTER EXAMPLE

In the private sector, an individual, well-thought-out cover letter is very important. If it doesn't appeal to the clients, they won't go further. A guideline to follow is this: Restate the client's goals in the first paragraph so that from the beginning, it's not about "us," and you show your understanding. The second paragraph should introduce the team members, not just who they are, but why the client should care—have they worked with the company before? Have relevant experience? Then, take a look at the RFP and the evaluation criteria, show how you meet the criteria and how your team benefits the client. It's matching "our" story to "theirs."

Next refer to what is unique about your proposal—shortened timeline? Coming in under budget? Ideally, something that makes you special. And don't forget to include contractual matters, such as "This contract is good for 180 days . . ."

The cover letter should be clear, concise and one page when possible—two at the most. Here is the closing section of one written to compete for a major construction project:

". . . Unlike pure bike planning firms, our firm knows what it takes to get to construction and we will therefore help ABCDE find feasible solutions for the White River trails."

Enthusiasm and Dedication

We have a passion for bicycle projects. For us, they are not a side business; they are a stand-alone practice area. Furthermore, our team includes avid cyclists and bike advocates. Our enthusiasm translates into focused attention to quality and service, and we take special pride in and ownership of these assignments.

On behalf of the project team, thank you for this opportunity to present our qualifications for this interesting assignment. We hope to have the opportunity to discuss our experience and approach further. Please feel free to contact me at xxx-xxx-xxxx should you require any additional information.

—Courtesy of Christine M. Cesaria

How to Handle Rigid Formats

In private industry as well as the government sector, you often don't have the freedom to choose the shape you prefer for your presentation. An RFP may dictate a standard set of categories and even set strict word limitations on each section. Follow the guidelines scrupulously. Watch for the "do nots" as well as "dos." If the RFP specifies, "do not write more than one paragraph" for a section, don't sneak in a super-long paragraph. You will be disqualified. The thinking: If you can't follow instructions for the proposal, why expect your performance to be better?

Still, apply ingenuity and find ways to incorporate the idea of an ES anyway. Usually RFPs have a project overview section that lends itself to this use. Predetermined formats can make it hard to maintain your story line, but you are more likely to be rewarded when you do.

How to Write Informal, Conversation-Based Proposals

Especially for service providers who operate on their own or in small groups, writing a proposal is a formidable task. In response to this challenge, many people produce generic boilerplate pitches that go on at length about their wonderfulness and devote perhaps a few paragraphs to the work at hand. A much better alternative is the conversation-based proposal that zeros in on the job without spending a ton of time on proposal writing.

Typically, a client has a problem to solve and hopes you will solve it. With a little encouragement, she will gladly tell you exactly what that problem is, why it matters, and what has already been tried. Resist the temptation to tout your qualifications! It may sound counterintuitive, but once you're in front of prospects, most take your credentials for granted. They want to know you can do the job or solve their problem.

Use the in-person conversation to find out as much as you can about that problem as well as the person and the organization. If you need to prime the conversation, try open-ended questions such as:

What do you want to gain? Why is that important?

What would you like to see different about_____?

How would that make your life better? Improve the organization?

What are you losing because of this (inefficiency/missed opportunity/waste/lack of competitiveness, etc.)?

How have you tried to solve this problem so far?

Listen for below-the-surface clues. Often people are conscious of symptoms rather than underlying causes. Someone might tell you his website doesn't draw because it's not optimized well, for example; this may be true, but poor content may be a bigger factor.

From this point, you can develop a solution right on the spot, working collaboratively with the prospect. Or end the conversation, make a second appointment if possible, then draft your analysis and recommendation on your own time. Two pages are enough for a simple synopsis that spells out the problem and its importance, followed by your solution.

For example, if I'm selling e-mail-writing workshops to a company and have spoken in reasonable depth with the person in charge, by telephone, or in person, I could write in a simple letter format this way:

> Dear Anne:
>
> It was a pleasure to meet you and learn about the interesting work ABC does.
>
> I'm sure the Can-Write team can help you meet the challenge we discussed. Here is how I understand your need.
>
> - ABC's junior managers are alienating the firm's wealthy, elderly investors by sending abrupt e-mails perceived as rude.
> - These staff members also produce internal messages that are confusing and inefficient, creating dissension and time-wasting situations.
> - An estimated 14% of staff productivity is lost through these poor e-mail skills, costing the company an estimated $xxx annually.
>
> Etcetera. Three to seven points are usually enough. Then:
>
> We propose a set of customized workshops led by writing experts who are seasoned presenters and work frequently with busy professionals. A series of five three-hour interactive, lively learning experiences will train your staff members to build good relationships with customers in all their writing. Specifically, they will learn and practice how to:
>
> - Understand the needs and expectations of ABC's audiences.
> - Create messages that demonstrate respect and consideration.
> - Plan and strategize all messages to accomplish specific goals.
> - Write with clarity, brevity, and impact.
>
> . . . and so on.

An effective proposal can be built this way, along with a few more sections according to the occasion (see the example below). Notice the emphasis on what will be accomplished. Typically the *how*—the process used to perform the work—is secondary. Good proposals, whatever their length, give the reader a vision of how much better life (and profits) will be when the project is accomplished.

A proposal in this letter format can easily be converted to an agreement—just amend it based on your prospect's input, add any provisions needed, and specify space at the end for signatures and dates. If a more formal proposal is needed, it's easy to adapt the written pitch along these lines:

Proposed by Can-Write for ABC Inc.

A training program to improve e-mail communication company-wide and build customer relationships

The Problem**—**in narrative style with bullets

The Solution**—**narrative with bullets

How We'll Work—some detail on what you'll provide (e.g., content of the workshops)

How We'll Collaborate—e.g., interactive client process to sharpen goals and deliverables

Who We Are—a tight profile of you/your team showing why you're the best for the job and your excitement with the project

What We'll Accomplish—a tempting vision of the problem solved and the wonderful future that beckons

Mutual responsibilities (and perhaps deadlines, relevant logistics, etc.)

Fees (which should at some earlier point be discussed, but not before defining the problem's scope and importance)

The conversational approach automatically produces a you- rather than me-based way of selling your service and writing proposals. And except perhaps for celebrities who tire of reading about themselves, if there are any, this approach never bores the audience. Moreover, clients are often more receptive to your solution when you lead them to clarify the problem and give it a value, typically higher than they originally would have assigned.

Four more tips for a competitive advantage in all proposals:

Practice the art of omission. Adopt the attitude of the popular fiction writer Elmore Leonard, who said, "I try to leave out the parts that people skip." Do the same. A concise proposal is more apt to be read all the way through and hold reader interest. Leave out the boilerplate statements full of empty hyperbole that anyone, in any industry, could use, and everything that does not support your story.

Skip the tech-speak. Pile it in back as a separate section or appendix if you feel it's needed, but don't break the narrative flow with details your prospect will not understand or care about. A businessperson, for example, doesn't want to know what programs a web designer will use to build a site. What that new website will accomplish, however, is magnetic.

Go for speed. In today's hyperactive world, the faster your writing reads, the better your chances of reaching other people and persuading them to your viewpoint. This in large part translates as "write short"—words, sentences, paragraphs, sections.

Inject energy and enthusiasm. Above all, evidence your passion for what you do. You want the work or the project or the grant—don't be afraid to make that 100% clear. Enthusiasm coupled with thorough understanding of client needs is hard to resist, sometimes even when the price is higher than the competition's.

SUCCESS TIP

COLLABORATIVE WRITING PROJECTS

In both classwork and the business world, you're often called on to participate in collaborative writing projects. This is a challenge: People have different levels of capability, especially when it comes to writing. In many instances, good writers feel like they are holding a very big bag.

The best solution is to plan the project carefully, breaking out the tasks and distributing them as fairly as possible. The work may encompass planning, research, obtaining information through interview, collecting and analyzing statistics or other data, creating graphics for illustration and final design, perhaps preparing an oral presentation—and writing, editing, and proofing. Agree on a project leader or coordinator, who should be given extra recognition.

Each person can take responsibility for one or more of the functions, according to the team's size, so that everyone agrees the workload is fairly distributed. Set a timeline that specifies when each phase must be completed, allowing for the time needed to accomplish all subsequent phases. Also set parameters for completing each aspect of the project: in what form research, data, interview, and technical information must be delivered . . . what the finished project should look like . . . checkpoints for the coordinator to manage so he can field problems. The full group should maintain regular contact and review each member's progress.

Put the plan in writing and mark deadlines clearly.

Be sure to allow enough time for the individual or team responsible for final writing to produce a cohesive document that doesn't sound like it was written by a committee. And at least one other person should thoroughly proofread.

CREATING EFFECTIVE NONPROFIT GRANT APPLICATIONS

An application for funding or project support from a government agency, foundation or corporation shares the essentials of proposal writing with some additional requirements. Foremost: Take the grant-giving organization's mission seriously. Invariably, those that invest money in a good cause or project of any kind feel passionately about their mission. *Be sure you understand what that mission is, and dovetail your application so it directly relates to it*. The mission orientation is also one reason foundations prefer to fund projects rather than support "operational expenses."

Another guideline is don't be boring. *Besides getting to the point quickly and succinctly, tell your story*. This might cover how your organization was created; what it has accomplished, preferably told through people you've helped or goals achieved; and a vision of how much better the world will be if your application is funded.

Avoid repeating material more than necessary. In the case of grants, most reviewers will read the full document and you need not keep regrounding them in the same ideas. If necessary to repeat, find another way to say it.

Stick to your central message, what you'll accomplish with the funding. Organize the document to correspond to the RFP and specific format requirements, but have a clear idea of the message you want to deliver and build a cohesive narrative as best you can. Each answer should stand on its own, contribute new information and add up to a compelling story.

VIEW FROM THE FIELD: A GRANT REVIEWER ON WHAT LOSES, WHAT WINS

What annoys me most is that people just do not answer the questions. They talk around the issues and don't get to the heart of things, the core interest of a donor or funder: Why should we give money to you and not another organization that's doing similar work?

Many grant applications are particularly light on the organization's impact. One, for example, asked for more money to do more work in the same area. They talked about how horrible the problem is that they deal with but not the agency's impact. I asked about it: "You've been using the money for 15 years—what difference have you made?" They talked themselves out of the funding.

Don't just cite numbers to show success—saying "we trained 500 people" isn't going to make me invest in your organization. I want to know what happened to those people a year later. It can be hard to track results with figures but you can show them anecdotally.

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I notice bad writing, I don't notice mediocre writing, and I do notice good writing—when you see something written well it has stars around it, sparkles. Good writing stands out.

Given that the application shows capacity and evidence that the organization can do the work, good writing gets the grant.

—Ann Marie Thigpen, director of Long Island Center for Nonprofit Leadership at Adelphi University

Grant Application Strategies

Nothing is particularly hard if you divide it into small parts.

—Henry Ford

Get in touch. Talk to the grant administrators. Ask questions about the level of detail they'd like to see, data to include, and even whether a particular project is a good candidate. This enables you to perfect your pitch.

It is a rare funder that will mind hearing from you, as long as you speak with intelligence. Making awards is a grueling business for funders as well as for the applicants. They're happy to help you meet their needs. Moreover, the interaction works toward building a relationship. We choose to work with and invest in people we trust. If you must pose your questions in writing, do it well and carefully.

Define the problem and focus on outcomes. Show clearly that you understand the problems to be solved, and what will be accomplished should the money be awarded to you. Funders often complain that many grant applicants fail to provide enough information on outcomes, which must be meaningful: "We will train 50 farmers to use the new agricultural method" is a so-what statement. But this is not: "We will train 50 farmers and show them how to train their peers. Each will train an additional 25 per year and they in turn will share their training. Within two years, the program will reach half the co-op's farmers and yield a collective crop increase of 15 to 20%."

Connect to the action. Link outcomes to the activities and methods you believe will bring them about. For example, if a program's objective is to help failing students improve their math grades by 20%, and the application says only that this will be accomplished by presenting 15 workshops, you haven't said, What will the students learn, who will teach them, and what innovative strategies will be adopted? Show a track record for the methods if you can.

Demonstrate accomplishments and set the stage for future applications. Understandably, many nonprofit organizations cannot afford expensive follow-up studies to prove a program worked. When you're responsible for managing the grant, look for tracking options at the very beginning and build them into the work. For example, field workers can be asked to make note of clients' input on how they were helped. In-person testimonials shot with a simple system, such as a smartphone, offer an excellent option for showing results in the human terms everyone responds to.

And always, report project results to the funder in writing, whether that's a formal requirement or not. Many requestors fail to do so and wonder why their new applications fail.

VIEW FROM THE FIELD: PROPOSAL ADVICE FROM AN NGO PROGRAM DIRECTOR

We start with knowing the audience and the language it speaks. We aim with all our writing to be very clear and direct. Saying it in simple terms is important. People often want to overexplain things in a proposal but then the less clear it becomes. Thread in too much detail and you lose directness and intensity. Put in too much mechanics and people start to get lost in the machinery.

There's an art to finding the most direct way to say something about a sophisticated idea in a short amount of space. Usually we have 10 pages to explain what we'll do with millions of dollars.

The underlying structure we use:

- Rationale
- Political context
- Why it's important
- Why we're the best to do the work
- What the work will actually be
- Timing
- Results we expect

I recommend outlining what you're trying to do, so you go into a document with a road map of how it all fits together. This tells you where questions will arise and what research you have to do so you have a game plan. The document may not end up much longer than the outline. This process helps people distill the ideas and concepts down to bullet points—then they have the luxury of adding detail and can figure out the sequence people will understand. An outline also lets us brainstorm with other people, who many times are overseas, so it's easy for them to contribute and you build buy-in in advance.

Always, put the bottom line up front. If you're asking for something, whether in a letter or proposal, come out with it right away. Be unambiguous. It gives the reader a unifying idea of what the document is about.

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This is important also because of another element, how you want readers to think of you. They learn about the team, and the project, by how the document is written. You want to be seen as straightforward, direct, easy to understand. You need them to trust you and feel they can get a very direct answer in a quick amount of time.

—Erin Mathews, director of Iraq Programs, the National Democratic Institute (an international development agency)

WRITING PROJECT REPORTS THAT WIN SUPPORT

Those who write reports often underestimate their value. If you hold a job that requires you to submit regular accounts of your own activities or your unit's to a supervisor or client, see them as opportunities rather than rote chores.

Pause to think before drafting a report to consider: Who's my audience? What do those readers want to know—need to know? What decisions may be based on what I say?

If the report goes to a supervisor, remember that he or she values staff reports not only as a way to hold people accountable but as information sources: They are probably her best access to knowing what's happening at ground level, degree of progress (or its lack), early-stage problems, activities to share or coordinate among different groups. A good report showcases your writing–thinking skills and often rewards you: with help if you need it, more responsibility, more interesting assignments, a promotion.

If you're a specialist who performs research and/or analysis for your client or your own organization, reports are how you tell a client what you've accomplished on her behalf. Reports are platforms for decision making. Many professionals with highly sophisticated technical skills fall into traps that undercut the value of their work. One way is to undersupply clear perspectives and bury readers in detail. This is a mistake because most readers care little about what you did to get your results or information and the data: They want to know what it means.

Delivering the message in an uninteresting, non-engaging manner is another mistake. Reports may not on the surface look like a source of entertainment. But in today's high-pressure environment, we all choose what we read and how much. This certainly applies to multitasking business leaders. Just because they want information doesn't mean they'll happily slog through a ton of lifeless material to find what they need and interpret it productively.

If you did the work well, the substance of a report isn't boring to you. So why bore the audience? Here are some techniques to make your reports at once more interesting, clear, readable, useful—and valued.

Stay Tuned to the Big Picture

Especially when massive amounts of data are involved, don't let readers get lost in the bog. People today don't want more information and data—we're all overburdened already. As always, it's the writer's job to predigest the information and develop a clear perspective based on what matters to that audience.

Journalists, the quintessential information gatherers, always ask themselves, "What's the story?" It can be far from obvious when a lot of research is involved, and the original concept may have evolved into something quite different. The reporter's mantra: Don't bury the lead. Identify what's important, interesting, and valuable about your message to the reader; lead with it; and organize the rest of your story (or document) to support it.

To uncover the message, try telling your story to someone else. This taps into your oral instincts, bypassing the more complicated way your brain works for writing. It also gives you more direct, simple language. Or ask yourself these questions: What is this really about? What did I find? Another route to true meaning is to frame the question your audience expects you to answer, such as: What does the evidence or analysis indicate to be the best decision? What are the alternative courses of action, and what are the risks and benefits for each?

Once you know your story, use the ES to highlight it. Offer a complete perspective on what's in the report, what's important, and your recommendations or conclusions. Usually the bottom line is your most captivating lead.

View the rest of the report as evidence and backup. You can cross-reference the sections within the ES so people can find the detail they prefer. But don't weigh those sections down with all your research and analysis. A report works best when relatively nontechnical readers can move through it quickly without becoming embroiled in too much data they probably won't understand or care about.

The bottom-line-on-top strategy works for all a report's sections. For each, first figure out the main import and put it in perspective. Don't slow down or interrupt the narrative flow with too many calculations, charts, graphs, or other "evidence." Most readers care about conclusions, not the process.

Use Action Heads and Subheads

Pull readers along with "action" headlines and subheads that say something, rather than labels.

Instead of writing, for example,

Pension Fund Forecast

Try

Pension Funding Inches Up

Or, use the label and add a headline:

Pension Fund Forecast: 14% Rise Seen for First Quarter

This technique automatically makes the material more interesting and captures reader attention. Being more specific helps people identify the must-read pieces, too—which is good. Today's reader, trained by the Internet, is active rather than passive and decides what to read based on the clues we present.

Use content-based headlines everywhere, including the ES. You can still use the label if preferred, but amplify it meaningfully. For example, "Executive Summary: Three Routes to Funding Pensions That Meet New Legal Guidelines."

Put the Backup in Back

Statistics, charts, graphs, and data batches are in general better placed in an appendix section, where they don't undermine your narrative flow, unless they're critical to your central message. Here's a quick formula for an effective technical report: ES/overview, main body spelling out major findings and implications, recommendations or conclusions, and a set of appendixes with all the data you find appropriate. The decision makers may well read just the summary, depending on the numbers people or tech specialists to vet the rest for problems.

VIEW FROM THE FIELD: WHY GOVERNMENT VALUES GOOD REPORTS

In international work, you need to communicate with people in different time zones, so writing is really the only way to do it. And we're the government, so we also need a documented paper trail for the record to show why we did something.

My job is to enable people to make good decisions, and to do it without my being present. We communicate a lot verbally, but not everyone is at the meetings. Even if they were, given the amount of information flow, they won't remember everything I say. So I need coherent, clearly written documents that give people everything they need to know.

Getting people to come together around a document to agree on major conclusions can, if it's concise and clear, generate the underlying decisions needed. For an internal audience, if I'm presenting research, I need the takeaway and justification for what I believe to be the case.

So writing is very important to me when I hire people. When I interview, I ask, "How would you explain this to our vice president who will make a decision about it? And how would you explain it to a group of curious students?" I walk them through different groups and it's quite telling to see how people would write for different audiences.

—Alicia Phillips Mandaville, managing director of development policy at Millennium Challenge Corporation (U.S. foreign aid agency)

WRITING PERSONAL REPORTS

The same techniques that work for research reports and funding applications will work for you when you report on your own activities. Even if you're filling out a form, think about what to say in the big-picture context. Start with an ES, not necessarily labelling it that.

Ask yourself all the questions about why the reader cares about the information, what it means, why it matters, what you need. Go for a proactive, upbeat tone and deliver the bottom line immediately. If you're writing about what you accomplished in January, for example, rather than beginning in a hum-drum just-doing-my-job fashion such as . . .

> This month, I continued to work on the software issues for the project I'm assigned to. Twenty hours were spent on research. I analyzed 47 possibilities. I also made some telephone calls . . .

Try something more like this—more like Warren Buffett:

> I'm happy to report that I will complete my analysis of software for the Zilch Project by January 17th. The good news is that we can accomplish all our goals and come in under budget. Here are some of the purchases I plan to recommend, which coordinate for efficiency and speed . . .

If you want help on the project, add something like this at the end of the summary: I can complete the report a week sooner if I can get some help with . . . .

Reports give you a major opportunity to demonstrate that you are a responsible, resourceful and capable individual who understands the organization and contributes to its bottom line, even if in a small way. Show that you're a problem-solver and that you're committed to your role.

SUCCESS TIP

HOW TO IDENTIFY CONTENT FOR REPORTS

When you have trouble establishing perspective on what you or your department accomplished during a given time period, or aren't sure what's worth sharing, ask yourself some of these questions.

What's important about the period's events in terms of company or department goals, immediately? Long-range?

What has changed or progressed?

What initiatives did you take? How did they turn out?

What challenges or problems did you encounter? How did you solve them?

Did you see new opportunities and act on them?

What surprised you?

Did anything occur that bears watching, or should be taken into account in planning?

Anything thought-provoking to share?

What (if appropriate) do you recommend based on recent events?

A WORD ON BUSINESS PLANS

Business plans are highly individualized documents that can take months or even years to evolve, because developing a new enterprise is tough. Writing the plan often pulls entrepreneurs through the grueling work of thinking out the idea and how the business will operate.

Develop the written document much like a proposal. You'll need sections explaining the mission—why the idea has value and why it's needed, who it will interest, how it will operate, and what it will produce. A business plan also needs a full marketing strategy, a convincing portrayal of a capable leader and team, and a detailed financial plan. All the techniques of persuasive writing apply to the presentation, including a great ES that shows off both your passion and practicality.

Asking for money is a serious business. There is help out there: the Small Business Administration, Small Business Development Centers, local business advisory groups, college programs, and many online sources of business plan formats and advice.

PRACTICE OPPORTUNITIES

I. Group Project: Invent and Propose a New Course

Collaborate in small groups on ideas for a new course that would add to your capabilities and qualifications. Pick one and brainstorm its benefits. Divide up the responsibilities, and collaboratively write an ES for a formal proposal to your school's director. It should explain what you recommend and why, using techniques of persuasion.

II. Group Project: Develop a Project Proposal

1. **Propose a cause.** Brainstorm in small groups to choose an idea for a new local charitable cause or a major project you agree would be of value to the community and is practical (e.g., cleaning up a park, collecting used clothing for a children's shelter, volunteering for an after-school tutoring service).

2. **Plan a proposal** to raise funds for the idea from local businesses or a civic group: Identify what needs to be done, set a timeline for each stage, and determine how to collaborate; each team member should assume an appropriate part of the work. Decide together on the central focus of your story, and be sure to include why the project is needed, who will benefit and how, the extent of demand, exactly what support you're asking for, activities and outcomes, and so on.

3. **Create the proposal in line with your plan.** Include an ES. Draw on the writing and persuasion techniques presented in this chapter and Chapter 9. Include appropriate graphics (or describe what they would consist of).

4. **Present the proposal.** The full class reviews all the proposals and votes on which to support, taking the role of a civic group or committee on corporate giving. If desired, the class can also conduct Q&A sessions with each group (which will highlight any missing information).

5. **Discuss results.** What characterized the most successful proposals? What persuasion strategies did you observe, and how well did they work? Were opportunities missed? And, how did the collaborative process turn out? Can a best practice set of directions be assembled for collaborative writing?

III. Write a Report

Create a written report on what you accomplished in this course during the past month. What did you learn, why does it matter, and how will you use it? What problems do you need to work on? How do you chart your progress? What recommendations can you give yourself for further improvement? Where do you need help, and how might you get it? For this, you (along with the professor) are your own audience.

IV. Class Discussion: When You Don't Agree With Your Employer. . .

In the business world, you may well be called on to write memos, letters, social media posts and endless other materials that speak to a viewpoint you disagree with or for which you have no natural empathy. This happens especially often in professional communications work. When should you voice your opinion? Where should you draw the line? Should personal values reconcile with job demands—and if so, how? Consider a concept public relations specialists espouse: There are many truths. Do you agree with that?

SELECTED RESOURCES FOR PART IV

A number of interesting websites and blogs connect psychology research to marketing and other persuasion needs. Here are a few I like. Notice that each site or blog has a tagline. Which do you think work best?

Changing Minds: "How we change how others think, feel, behave and do." Large resource of ideas about tactics of persuasion: (http://changingminds.org/techniques/general/overall/overall.htm).

Psyblog: "Understand your mind." Psychologist Jeremy Dean's website covers scientific research that relates to everyday life (www.spring.org.uk).

Psychotactics: "Why customers buy and why they don't." Sean D'Souuza on psycho-tactical strategies for small business (www.psychotactics.com).

Neuromarketing: "Where brain science and marketing meet." Roger Dooley blogs on this subject and recommends other current material. He is also the author of the book *Brainfluence: 100 Ways to Persuade and Convince Consumers With Neuromarketing* (www.neurosciencemarketing.com/blog).

Social Triggers: Derek's Halpern's take on applying psychology science to business (http://socialtriggers.com).

You Are Not So Smart: "A Celebration of Self Delusion." David McRaney's in-depth observations on the flawed perception and reasoning behind what happens in the world (http://youarenotsosmart.com).

The Web Psychologist: "Want to discover the science of online persuasion?" Nathalie Nahai applies persuasion techniques to online writing (www.thewebpsychologist.com).

Influence at Work: "Proven Science for Business Success." The website of Robert B. Cialdini, PhD, the leading researcher in the field and author of widely respected books including *Influence: The Psychology of Persuasion* (www.influenceatwork.com).

A Few More Books

Tell to Win: Connect, Persuade, and Triumph With the Hidden Power of Story, Peter Guber.

Illuminating and entertaining view of "the story" and how to use it in business by a Hollywood/sports/business power broker.

Fascinate, Your 7 Triggers to Persuasion and Captivation, Sally Hogshead.

How to fascinate people and influence decision making.