

Communication



The book explores the multifaceted role of facility managers, emphasizing their imperative need for effective communication across diverse audiences. From engaging with staff and contractors to interacting with upper management, government officials, and community leaders, facility managers navigate a complex web of communication. The text delves into the art of utilizing various media channels, including print, electronic, social media, voice, telephone, and signage, as a strategic means to accomplish their objectives and effectively connect with their target audience.



IFMA Facility Management Learning System

Book 1

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Content Development SMEs

Stephen Brown, CFM, FMP, CPE, CBCP, REM	Kirt Miller, FMP, CFM, IFMA Fellow
Dean Hitchcock, Lieutenant Colonel, USAF, CFM	John Parsons, CFM
Joachim Hohmann, Ph.D., MSc, MBA, CFM	Teena G. Shouse, CFM, IFMA Fellow
David L. King, AIA, CFM, SFP, LEED AP	David L. Teska, MS, MPCP
Robert Kleimenhagen, Jr., CFM	Kate Thibeault, CFM, ABCP
Louis Liu	

Content Analysis SMEs

Dr. Doug Aldrich, CFM, IFMA Fellow	Erik A. Johansson, CFM, FMA
Jeff Allcroft, CFM, SFP, LEED Green Associate	Lawrence G. Kownacki, CFM
Becky Beilharz, CFM	Maja MacDougall
Sean N. Bondar, CFM	Peggy A. McCarthy, CFM, IFMA Fellow
Evelyn Braie, CFM, CFMJ, ACIPM	Tony Miele, CFM, FMP
William D. Broome, CFM, SFP, LEED Green Associate	Patricia A. Moonier, CFM, FMP, SFP
CHAN Kwong Fuk Wilson	Patrick H. Okamura, CFM, SFP, FMP, CSS, CIAQM, LEED BD&C, IFMA Fellow
Jack Christensen, CFM, REP	Anthony Pizzitola, MBA, CFM, CBCP, MBCI
William T. Conley, CFM, IFMA Fellow	Larry E. Rust, CFM
Gerard DiCola, CFM, FMP, LEED Green Associate	Ronald V. Sachse, PMP, CFM, SFP, FMP
Joseph M. Drew, CFM, PMP, SFP	Mark R. Sekula, FMP, CFM, LEED AP, IFMA Fellow
Howard “Buck” Fisher, CFM, LEED Green Associate	Erik Selvig, CFM, LEED AP ID+C, CSBA
Patricia Galley, CFM	Mary L. Speed-Perri, MBA, CFM
Victoria Hardy, CFM, CFMJ	Meredith Thatcher, CFM, IFMA Fellow, LEED AP
Christopher P. Hodges, P.E., CFM, LEED AP, IFMA Fellow, FRICS	Ryan Thompson, CFM, CMRP, MMP, ALB
John Huffman, CFM, FMA	Kit Tuveson, CFM, SFP, IFMA Fellow
	Fred Weiss, CFM, IFMA Fellow
	Dave Wilson, CFM, PGDipMgt, MBIFM



Course Overview

The IFMA Facility Management Learning System

The IFMA Facility Management Learning System was developed to cover the entire facility management body of knowledge. In 2009, the International Facility Management Association (IFMA) conducted a global job task analysis (GJTA) to identify the tasks and knowledge that are important for competent performance by facility managers across the world. As part of that effort, IFMA identified the following core competency areas and described the knowledge and skills required for these competencies:

- Communication
- Emergency Preparedness and Business Continuity
- Environmental Stewardship and Sustainability
- Finance and Business
- Human Factors
- Leadership and Strategy
- Operations and Maintenance
- Project Management
- Quality
- Real Estate and Property Management
- Technology

Developed by IFMA and a team of subject matter experts, the Facility Management Learning System encompasses current knowledge, best practices and trends in facility management, covering all 11 core competencies.

In addition to preparing professionals for the CFM exam, the Learning System is an excellent professional development tool and an indispensable on-the-job resource. You will find the program to be a complete, easy-to-use learning and reference tool.

✦ Getting Started

Course materials

This course allows you to work at your own pace to increase your understanding of facility management and the IFMA body of knowledge. It includes six printed textbooks that correspond to the knowledge domains tested on the IFMA CFM exam. The extensive content is organized by competency and chapters, so you can tailor your studies to areas that require additional study. The course also includes interactive online testing with hundreds of questions and learning activities,



designed to reinforce what you study in the printed books, test your retention and help you prepare for a competency-based exam.

Please check that you have received the six textbooks and your online system invitation (provided to you via e-mail) for access to the online course components.

If anything is missing or if you have not received your invitation e-mail, please contact IFMA Facility Management Learning System Customer Support at 1-877-866-1367 (U.S./Canada) or +1-651-256-2821 (worldwide).

Accessing the online course components

Before you use the online components of the course, you must create an account in the system:

1. Click on the link in your invitation e-mail. This will take you to the Web site to create your account to access the online components of the course.
2. Read and accept the terms-of-use agreement.
3. Create a login name and password. Both must be at least eight characters.
4. Log in using your newly created login name and password.
5. Complete the short survey.

You will use your login name and password to access the Web site in the future, so write this information in the space below.

IFMA Facility Management Learning System	
Login name:	Password:

Note that access to the Web-based software components of the IFMA Facility Management Learning System is valid for one year from the date of the invitation e-mail sent after purchase.

Accessing the program

Once you are enrolled, you can access and leave the program as often as you wish. **To access the program:**

1. Go to **<http://ifmacredentials.org>**.
2. Click “Log In Now” to go to the IFMA Facility Management Learning System login page.
3. Enter your login name and password.
4. Click Log In to enter the course.

Read the online overview and then go to the course menu, from which you select course components.



Exiting the program

You may exit the program from most screens by clicking Log Out. This option allows you to leave the program and return at a later time to where you left off. All current scores and your current place in the tests are saved. You may start any activity over at any time. If you start over in a test, your current score is erased. Upon completion of that test, your new score is saved and displayed on your reports.

Online help

The Frequently Asked Questions option on the ifmacredentials.org Web site is available to answer common questions related to enrollment and login. If you require additional assistance, please contact IFMA Facility Management Learning System Customer Support at 1-877-866-1367 (U.S./Canada) or +1-651-256-2821 (worldwide), Monday through Friday, 8 a.m. to 5 p.m., central time or e-mail CFMprep@holmescorp.com.

For specific details regarding the certification exam, please visit ifmacredentials.org/cfm.

Learn more

The IFMA Facility Management Learning System combines printed material and online software plus an instructor-led option to enhance your learning effectiveness. Go to www.ifmacredentials.org/cfm to learn more about the advantages of IFMA membership, the power of certification and the various learning options.

✦ Completing the Course

Increase your knowledge base with this enjoyable and complete program as you prepare for the IFMA CFM examination and develop your professional expertise.

Using a blend of printed text and online practice testing and learning reinforcement activities, the IFMA Facility Management Learning System provides an enjoyable and complete preparation method for the IFMA CFM certification exam.

You may complete the course in any order. The following describes the recommended step-by-step method.



Step 1: Review the “Facility Management Overview” tutorial.

The introduction tutorial provides an overview of the facility management competencies.

Once you have read the description of the course on the Overview screen and become familiar with the online components, review the first item on the menu, “Facility Management Overview.” This brief presentation is an introduction to help you become familiar with the role of facility managers and gain an understanding of the competency areas of facility management. For those of you transitioning into facility management from other careers, this module has been



designed to help you see your past experience in the context of the practice of facility management.



Step 2: Complete the pre-test.

You begin to plan your own course of study by completing the online pre-test. This 50-question test checks your basic understanding of facility management concepts.

The pre-test allows you to evaluate your understanding of facility management concepts and focus your study.

As you answer each pre-test question, you will know immediately if your answer is correct or incorrect and you are given a reference to the competency from which the question was drawn. If you leave the test, you can reenter it and will have the option to either continue or restart the test. You may also print any page by using your browser's print function.

When you have completed the pre-test, you see a report that shows your score by competency area. You may use this report to develop a study plan to help focus your efforts on the competencies you need to examine most thoroughly. Use the print function on your browser if you want to print a copy of your pre-test results.



Step 3: Study the print modules.

The entire program includes more than 1,550 pages of text reinforced by online practice testing and learning reinforcement activities.

Based upon your individual study profile, study each of the 11 competencies at your own pace. Each competency is broken into chapters that focus on key concepts within that domain. Read and study each chapter. At the end of each chapter is a progress check. Progress check questions provide an opportunity for you to stop and think about what you have just studied. They include a page reference with the correct answer to guide further review.

It's important to remember that facility management is a profession that encompasses multiple disciplines to ensure the functionality of the built environment by integrating people, place, process and technology. The necessity of having different requirements, procedures and services for different types of facilities is one reason that FM knowledge and skills cover such a broad area. Although the print text is divided into the different competency areas, much of the knowledge and many of the skills apply to more than one domain.

Note: The term "entire organization" is used throughout the course to apply to the facility management organization's parent or client organization (corporation, government body, nonprofit, etc.).





Step 4: Complete the chapter-specific quizzes.

Chapter-specific quizzes check your understanding of each competency.

After you have studied each chapter of the printed text, return to the interactive online study tools and complete the chapter-specific quizzes. You may take as many quizzes as you like, as often as you like. After you answer each question, you will know immediately if your answer is correct or incorrect along with the reasoning for the correct answer. If you leave a quiz, you can reenter it and will have the option to either continue or restart the quiz. You may also print any screen by using your browser's print function.



Step 5: Complete the competency-specific eFlashcards.

The eFlashcards provide an opportunity to review terms and definitions by module.

After you have studied the chapters and completed the online quizzes, complete the eFlashcards for that competency. The eFlashcards are drawn from the glossary and represent the key terms in the course, providing an interactive drill-and-practice review option. The eFlashcards present a definition of a term, and you supply the term. Click to “flip” the card to check your answer. You may visit the Resource Center to download a printable version of the competency-specific eFlashcards.



Step 6: Complete the case study exercises.

The case study reinforces the main concepts presented in the course.

Check your understanding of the course content with the online case study. These exercises reinforce selected concepts presented in the text and allow you to apply that knowledge in a real-world application.



Step 7: Complete the post-test.

Post-test questions will be new. If you don't pass the post-test, the program helps redirect your study efforts, and then you can take the test again. Or use the post-test as a refresher to help you stay current.

When you reach this point, you've studied all the components of the program and are ready to measure your learning gain. The 50-question post-test draws from a different question bank than you saw in the pre-test, so all the questions are new. After you answer each question, you will know immediately whether your answer is correct or incorrect and will see the reasoning for the correct answer to help clarify your understanding. If you leave the test, you can reenter it and will have the option to either continue or restart the test.

After you finish the post-test, you may view a report that compares your pre-test and post-test scores and your scores on questions related to each of the 11 competencies.



You may take the post-test as many times as you wish until you are satisfied with your results. Each time you retake the post-test, your new score is saved. All attempts are recorded in the system and available to you on the reports.



Step 8: Complete the “Experience the Exam” practice exam.

The practice exam allows you to get a feel for the actual IFMA CFM exam.

This practice exam is a useful tool to help you prepare for the CFM exam. Although only a small number of questions are included in this testing “experience,” it was added to provide an opportunity to practice applying knowledge in a competency-based exam similar to the CFM exam. The practice exam’s format and functionality emulate that of the software used at the Prometric testing center. As such, the practice exam has the same marking and review features as offered by the software at the testing center.

The test is timed to enable you to determine whether you are answering questions at the pace needed to complete the IFMA CFM certification examination within the time allotted. If you are interested in timing your test, allow yourself an uninterrupted block of time.

As with the CFM exam, you do not receive instructive feedback after each question. However, the online reports allow you to see which questions you answered incorrectly and provide feedback for additional information.



Step 9: Review your reports.

Review your reports to measure your progress through the course at any time.

At any time, you may view online reports of your progress by clicking the Reports link. The reports show the dates you have completed tests as well as your scores for each attempt of the pre-test, chapter-specific quizzes, post-test, and “Experience the Exam” practice test. You can use the reports to determine where you may have areas of strength or weakness to direct further studying of the course.



Step 10: Complete the Program Evaluation.

Help us improve our product offerings and request your Certificate of Completion.

We would appreciate your feedback. Select Certificate of Completion from the menu and complete the online Program Evaluation form. Upon successful completion of the course (a post-test score of at least 80 percent), you can print a Certificate of Completion (recognizing completion of the learning system) from the Program Evaluation form.



Communication

✦ Introduction

Role of facility managers as related to *Communication* competency

Facility managers are critical to organizational success. They work with staff internally across many functions such as research, production, sales, learning and development (training) and administration as well as with many individuals, interested stakeholders and the general public outside the organization. Communication provides the conduit through which a facility manager reaches anyone—internal or external—who has an interest in the FM organization and its processes. Through communication, a facility manager acts as translator between the internal and external world.

According to the IFMA global job task analysis:

Facility managers have to communicate effectively with many different audiences including but not limited to staff, contractors, occupants, other department heads, peers, upper management, boards of directors, government officials and community leaders. They have to understand how to use different media (print, electronic, social media, voice, telephone, signage, etc.) to best achieve their purpose and reach the intended audience.

The importance of communication

What is communicated and how it is communicated play a significant role in the success a facility manager has in ensuring that FM services meet the needs of stakeholders by listening to their needs, sharing information and advancing FM agendas with the various audiences.

FM communications need to accommodate the fact that all stakeholders do not have the same levels of expertise or need for information. Senior or executive management (sometimes referred to as the “C-suite” or “corporate suite”), for example, will require information such as return on investment (ROI), payback period, depreciation and amortization. Consider communications about an office relocation due to a lease expiration as an example. An overview intended for the board or senior management should address the “bottom line” financial and operational impact of the relocation as well as sustainability; detailed financials and a snapshot of milestones directly from the actual project plan might well be appropriate. However, communicating the same relocation project overview to facility occupants, service providers, suppliers and the community would, of necessity, be much different.



Many additional factors shape FM communications:

- **Organizational structure and culture.** Organizations all have uniqueness about them when it comes to structure and culture. Some organizations have a top-down directive communication style; others have a sharing and developmental culture. In some situations, regulatory or compliance requirements for document control exist. Whether formal or informal communication styles are the norm will influence FM communications. If an organization has all workers in one location or they are geographically dispersed is yet another consideration.
- **Union or work council environment.** If unionized, an important consideration is whether union relations are positive and progressive with open dialogue. The nature of any work council relationship is a similar consideration. Work councils (which are elected bodies of workforce representatives or, in some instances, joint committees with employer representatives) have the overall task of promoting cooperation within an enterprise. As “shop-floor” organizations representing workers, a work council relationship affects the exchange of information with FM.
- **FM’s position in the organization.** Even the stature of the FM function affects communication. Whether facility management is considered a strategic player or more of a traditional support role shapes the voice of FM communications.
- **Community relations.** Interactions with the surrounding community can be a highly effective and efficient strategy to convey information about FM services to a broad audience. How effective a facility manager is in creating interest, capturing attention and showing positive connections between FM and the community can strengthen both individual and organizational stature within the community.
- **Technology.** Technology affects nearly every aspect of facility management. It is also a constantly changing field. There are unending entrants in hardware, mobile devices and methods of sharing information and data. FM must have the appropriate technology in place to gather, store, manipulate and disseminate information to all stakeholders in a seamless and effective manner, much in real time.
- **External vendor and supplier relations.** Vendor and supplier communication is vitally important to FM operations. Proper communication exchanges with existing and potential vendors and



suppliers helps to ensure complete understanding of organizational and customer requirements as well as vendor and supplier product and service availability. Communication techniques will vary, but effective vendor and supplier communication creates efficiencies, realistic expectations about marketplace capabilities, higher-quality contract deliverables and fewer performance problems.

Collectively, these factors and other organizational specifics determine the level of contact, the formality, the appropriate media choice and the frequency of communication.

Simply stated: The ability to communicate effectively and efficiently both orally and in writing with internal and external stakeholders is a business necessity for all facility managers. The expertise and needs of different audiences must be accurately assessed and addressed—whether it's the board and senior management or peers, staff, occupants or others. And FM communications must take into account whether those individuals are educated professionals or semiskilled or unskilled workers and if the individuals are in-house, contract or consultant. As we will see, it is important to analyze your audience, anticipate what they know and what they need to know and communicate with the individuals in terms that they can comprehend.

Overview of *Communication* competency

If asked to assess their communication competence, not all facility managers would say they excel at communication or possess a natural ability to communicate purpose, ideas, directions and other information. But there is nothing mysterious about being a good communicator. It may often be hard work. But the principles are straightforward, and competence is readily achievable.

The goal of this *Communication* competency is to overview the fundamental knowledge and skills a facility manager needs to be an effective and efficient communicator in formal and informal interactions using any type of media—whether in person, on a one-to-one basis, through a formal presentation, or through staff, via the Internet, a Web site, other electronic devices, social media, written materials and so forth.

Such competence, in turn, will enable a facility manager to:

- Prepare and deliver messages that achieve the intended result.
- Manage/oversee the development and use of the facility management communication plan.



- Improve positive visibility to all stakeholders.
- More effectively and appropriately communicate with senior management.

Effective communication gives a facility manager credibility in the boardroom, which is becoming more and more critical in today's environment. Meaningful communication can influence the mindset of the entire organization. This can allow the facility manager to convey the fact that the facility is an asset or investment needing strategic thought and planning, versus just a cost of doing business that can be reduced or eliminated. Two-way communication with all levels is an essential survival tool for facility managers today and in the future.

A snapshot of competency contents is shown below in Exhibit 1-1.

Exhibit 1-1: Overview of *Communication* Competency

Chapter	Content
1. Communication Fundamentals	• Overview of organization communication processes and principles, the essentials of interpersonal communication, barriers to communication and issues in organizational communication and influences
2. Business Communications That Achieve Results	• How to communicate effectively in business through e-mails, memos, letters, plans, reports, presentations and meetings • Overview of the communication aspects of negotiation, influence and persuasion
3. Stakeholder Expectations and Facility Management Communication Plans	• How to effectively manage stakeholder expectations • Characteristics of effective communication plans • How situation-appropriate media supports stakeholder communication

None of the information that follows is theoretical. The communication content presented in this competency provides a tool kit of knowledge and skills you can use internally and externally.

Because no two organizations and environments are identical, you should consider how the information applies to your situation and evaluate how you can work on your personal style and practices to become a better communicator.



Chapter 1: Communication Fundamentals

After completing this chapter, students will be able to:

- Describe how communication takes place in organizations, including barriers that can inhibit organizational communication.
 - Identify effective and efficient communication skills.
 - Explain key aspects of communication across cultures.
 - Recognize prevailing issues that shape organizational communication.
-

To understand how a single communication can result in success or missed opportunity, let's consider a not-so-fictional scenario.

Example:

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

There are many ways to share and communicate information. The plight of this facility manager occurs all too often. The presentation was not communicated in the business language senior management could embrace and act upon. The facility manager allowed the operational message to overtake the strategic message that senior management needed to hear.

The ability to communicate quickly, succinctly and accurately is facilitated by the abundance and diversity of available information, data and knowledge and by the vast array of technology and media. But equally important is the capability of knowing what information to communicate for a given purpose. You need to ask yourself:

- What is the need of your audience?
- How does the subject of your presentation fulfill the audience's need?
- How can you make the benefits of the presentation clear to the audience?

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



* Topic 1: The Nature of Communication

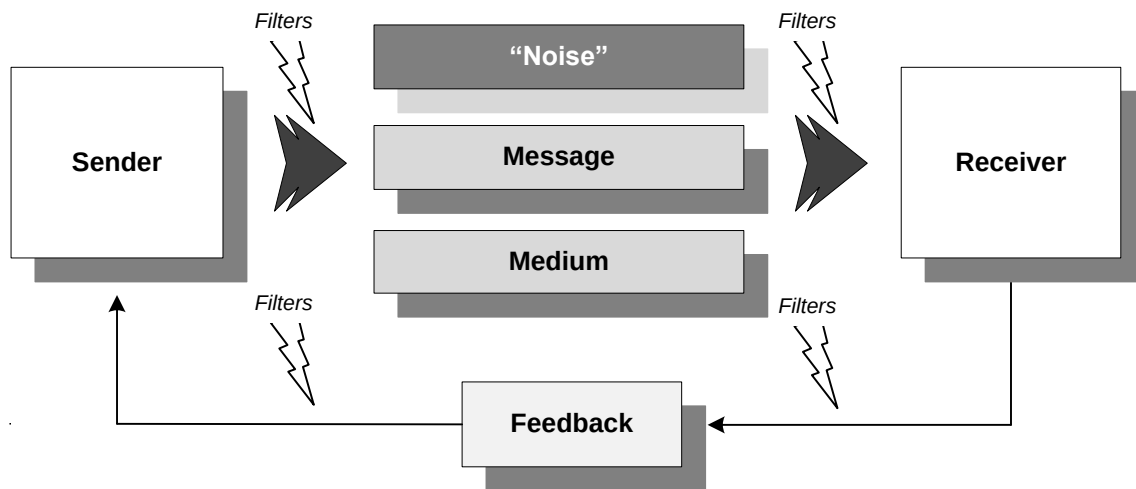
Communication, defined

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

The communication process

Whether a facility manager informally talks with a colleague one-on-one or makes a presentation to multiple people, the transfer of the information between the two individuals or from the facility manager to the group is the same communication process. Exhibit 1-2 depicts the elements in the communication process.

Exhibit 1-2: Basic Communication Process



As shown here, communication involves transmitting and receiving information. This is true whether the communication is human or technology-enabled. The key elements in the communication process are:

- **Sender**—True to the label, the sender is the person with ideas, concepts, requests or other information to convey.
- **Message**—This is the subject matter of the process, the translation of the sender's information into a systematic set of symbols or sounds (written, verbal, nonverbal gestures or some combination). It is sometimes called an "encoding process."
- **Medium**—The medium is the pathway through which the message is sent (oral, written, electronic and so forth).



- **Receiver**—The receiver is the intended audience, the individual or group that “decodes” or interprets the message in light of previous experiences or frames of reference.
- **Filters**—A filter is any factor influencing how the communication is received or interpreted. Filters may take many forms such as feelings and emotional states (mood), individual perceptions and experience or culture. Because of filters, a message may not be received at all.
- **“Noise”**—Noise is essentially anything that distorts a message. Noise can take many forms, including background sounds, another person trying to enter into a conversation or any other distractions that prevent the receiver from paying attention or accurately understanding what is being communicated. Similar to filters, noise interferes with and can inhibit the communication process.
- **Feedback**—Feedback is the verbal or nonverbal reply or reaction to the message. Feedback provides a vehicle for receiver response that allows the sender to assess if the message has been received as intended.

Communication takes place when a message, information or understanding is sent by one person and received by one or more persons. The sender transmits a message that is passed on to the receiver. The receiver, in return, has the opportunity to give feedback. If the message wasn’t received as intended, the sender should revise the message accordingly and repeat the communication process.

Example:

A facility manager meets with the director of building security to review a new policy for after-hours building access. Working together, they agree to make some minor word changes. Later in the day, the facility manager releases the policy to building occupants through multiple media. Recipients are given the name and contact information for the FM department if they have any questions about the policy.

In either situation, based on individual and group responses and feedback, the facility manager assumes the communication process was effective. If the communication results in the intended action and occupants adhere to the policy changes, the communication will be successful.

Forms of communication

In attempting to further understand what makes for effective and successful communication, it is helpful to recognize the various forms of organizational communication. In any given organization, communication may be generally classified as formal and informal.



Formal communication

Formal communication is officially sanctioned. Such communication is planned and carried out according to organizational structure and the official chain of command. Because formal communication is highly documented, amendments and changes are restricted.

Typical examples of formal communication include mission and vision statements, goals and objectives, organizational brand, policies and procedures, organizational or departmental meetings, staff meetings, e-mails, publications and newsletters, public relations information, official notices, signage and training materials and events.

Formal communication is informative and factual. Even if the tone or format seems casual, a formal communication is designed and intended to convey an official message that should be adhered to.

Example:

Facility occupants should pay careful attention to an FM communication about parking lot maintenance and adhere to special instructions even if the information is sent in an e-mail and posted via social media.

Informal communication

Informal communication is not officially sanctioned information and does not follow any official chain of command. However, the majority of communication in an organization is informal, so the importance should not be underestimated.

A wealth of information is spread through informal communication media such as personal conversations, telephone conversations and voice messages, e-mails, text messages, social media and impromptu meetings. Such informal communication helps to create and sustain open communication in an organization. Oftentimes, informal communication plays a vital role in tandem with formal communication.

Example:

A facility manager reviews the department policy and procedure for alarm system preventive maintenance with a new staff electrician. When the electrician is in the field, testing an alarm system, the facility manager sends a text to remind the electrician to follow-up with the customer when the job is complete and confirm that the alarm is working properly.

The grapevine

The “grapevine” is a common type of informal communication in organizations. Generally defined, the grapevine is an informal person-to-person method of transmitting information, gossip and rumors from person to person. Grapevines are unsanctioned information networks of friends or acquaintances.



Realistically, every organization has one or more grapevines operating in varying degrees. Sometimes grapevines are frowned upon by management; in other organizations, they are nurtured and considered a valued source of information.

A grapevine arises from social interactions. It is unstructured and beyond any official management control. Where a formal communication is highly documented and there is limited chance to change a message, grapevine information is open to constant change and interpretation as it moves through the network. Grapevines move information through conversation, e-mails, texts and other informal forms of communication. For these reasons, grapevines are as dynamic and varied as the people in any organization.

Grapevines persist each day, ranging from carpool exchanges to conversations up and down hallways, in meetings, after meetings, during break time and extending to extracurricular activities, gatherings and exchanges after work hours. Social media often rapidly accelerates grapevine communication. The case can be made that the grapevine is “24/7” communication as people communicate via the grapevine during work, after work and offline, constantly. Classic psychology studies of grapevines demonstrate that they can provide participants with a sense of belonging and an outlet for imaginations as well as apprehensions.

Information in the grapevine often spreads faster than formal communication. Grapevine communication jumps from one department to another and across levels of management and staff. Rumors spread through the grapevine tend to thrive in organizations, and they tend to have a longer life span than formal communications.

Dealing effectively with grapevine communication is a challenge that a facility manager will always have. Because grapevines tend to transmit information quickly and efficiently, they can be useful in supplementing formal channels. However, when grapevines transmit incorrect or untimely information, they can be disruptive to people and the organization. A grapevine turned dysfunctional can have a negative impact on morale and fuel anxiety, conflict and misunderstanding.

When aware of grapevine communication in action, one of best strategies for a facility manager is to try and ensure that the key persons in the grapevine get the right information.



Example:

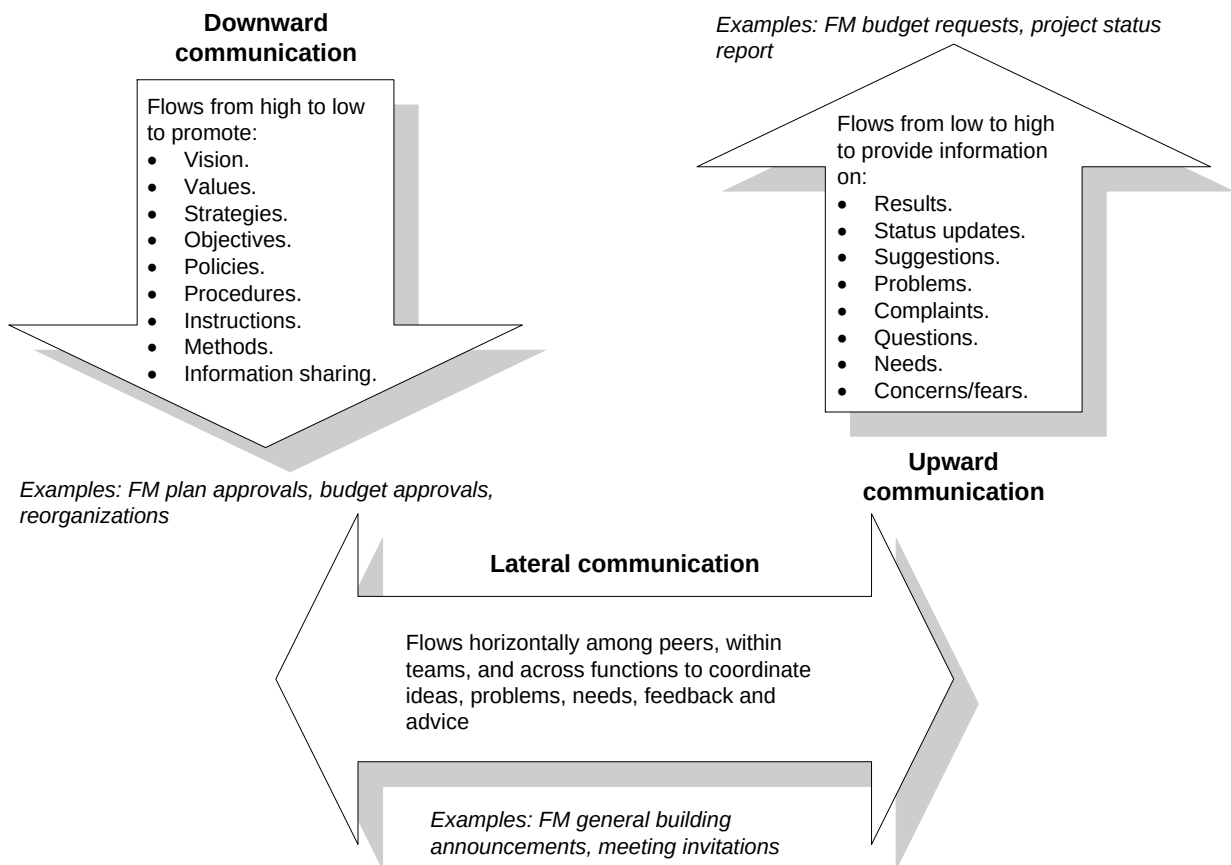
The grapevine springs into action following an organizational announcement about a relocation. Formal communication addresses why the relocation is happening, whom it will affect, where the new space is located, when the move will take place, how the new space will affect them and key contacts for relocation information.

However, the facility manager is aware that fears and anxieties are causing general uneasiness among facility occupants. Department contacts and employee representatives from various functions were enlisted by the relocation project team to help secure and maintain employee cooperation in the project. The facility manager tries to ensure that these individuals are privy to accurate information about the details of the move and how the plans will affect occupants, the thought being that these individuals have good potential to influence their peers through the grapevine prior to the move.

Communication channels

As just described, communication in an organization occurs through formal and informal pathways and the grapevine. A communication channel refers to the direction and flow of communications. A communication channel may be categorized as upward, downward or lateral (horizontal). Exhibit 1-3 portrays basic characteristics of these directions and information flows.

Exhibit 1-3: Communication Directions and Flows



Each communication channel serves an important function in organizational communication. Circumstances should dictate the most effective channel for communicating information.

Examples:

- **Downward communication**—A board and senior management share feedback and information on organizational performance and results.
- **Upward communication**—A customer satisfaction survey informs FM how satisfied occupants are with facility services.
- **Lateral communication**—A cross-functional project team works together to brainstorm problem solutions.

Barriers to communication

No communication is complete just because a message is sent. That is true regardless of the communication form or the channel. A sender is translating thoughts into words; a receiver is translating words into thoughts. A common problem in communication is the difference between what the sender says and what the receiver hears, interprets and understands. The filters and “noise” shown in Exhibit 1-2 affect what is sent and received and create many opportunities for errors and misunderstandings—barriers to communication—to creep into the process.

Barriers to communication prevent the effective exchange of information. Barriers may be tangible and intangible factors that compromise the ability of a person to pay attention to what he or she is hearing or reading. Barriers may also be subtle or rooted in attitudes, values and relationship with the sender. The fact is that barriers to effective communication can and often do occur.

Common barriers a facility manager must deal with in FM communications include the following (individually or in some combination).

- **Interruptions or distractions.** Interruptions to take telephone calls or reply to e-mails, texts and instant messages can affect people’s concentration and interfere with effective communication.
- **Environment challenges.** Background noise, poor lighting, temperature discomfort or other environmental factors can be barriers. Even communicating with people in different buildings or geographic locations can be problematic and a barrier. Communicating in the proper venue or environment to minimize interruptions, distractions and other environmental challenges are all potential barriers.
- **Frame of reference.** Depending on an individual’s knowledge, education and experience as well as the type of organization, different people can



interpret the same communication differently. Government, nonprofits and private-sector perspectives on FM procurement, for example, have unique requirements. Even within the same organization, it is important to have consensus on operational definitions.

- **Value judgments.** An individual listening to or reading a communication may assign an overall worth to a message before the message is complete. For example, personal stereotypes, prejudices or preferences—even emotions—may lead an individual to form an opinion about a message during the communication event.
- **Source credibility/status.** Does the receiver have trust and confidence in the person sending the message? Is the sender a colleague or a friend? Is the power relationship between the sender and receiver unequal? Such relationship and political factors can influence how people evaluate the words and actions of the communicator.
- **Languages and dialects.** The same word can mean entirely different things to different people. For example, a message sender requests “a light” (related to lighting) but the message receiver responds (in earnest), “Do you want a cigarette as well?” Difficulty understanding or speaking a language can lead to frustration and/or embarrassment. Some words simply do not translate and the meanings are mistaken.
- **Resistance to change.** Accepting change from an individual perspective is usually progressive and occurs over time. Any communication dealing with change must take into account change management and change leadership principles. (Note: Change management is covered in both the *Leadership and Strategy* and the *Human Factors* competencies.)
- **Inappropriate communication medium.** The medium should suit the message. The wrong communication vehicle may have unintended consequences ranging from mild indifference or misunderstanding to damaged relationships, broken trust, anger, disunity and hostility. The inappropriate use of e-mail is a good example. The overload of workplace e-mails often desensitizes recipients to the contents. Similarly, including excessive detail in an e-mail can overwhelm recipients, cloud the message and generally thwart the objectives and intent of the communication.
- **Generational diversity.** Differences between generations may affect communication. Obviously, not every older traditionalist, baby boomer, gen Xer or millennial may fit within their generational stereotype. But lack of understanding across generations can have detrimental effects on



communication and working relationships and undermine effective services.

- **Cultural differences.** Different cultural perspectives may inadvertently lead to miscommunication and misperception. For example, a simple hand gesture in a meeting with global participants could mean “perfect” to some but represent an insult to others. (Note: Subsequent competency content on cross-cultural communication provides more detail on cultural differences.)
- **Absence of feedback.** Feedback is a vital part of the communication process. It helps to remedy any disconnect between the intended message and the perceived meaning. Depending on the complexity of the message, feedback to ensure clarity of a message may be as simple as a paraphrased understanding of what the receiver heard or saw. Time allowed for questions and answers and clarification is another feedback mechanism. In electronic communications or social media, feedback occurs when a receiver responds with another message or comment. Whatever the form, feedback helps to mitigate interferences in the communication path.
- **Timing.** Inappropriate timing can be a communication barrier. It is human nature that people are more receptive at some times compared to other times. You may get a terrible reception to a great idea one day, but if you choose another day, you might get a more favorable outcome. Consider the other person’s state of mind, emotions and time schedule to assess whether it is a good time (and place) to talk about a particular subject. In the event of unexpected negative reactions during a conversation, consider whether the other person is simply not ready to hear what you have to say. Sometimes it may be best to continue at another time.
- **Sheer volume of communication.** In today’s workplace, business accountability and availability—even the general spirit of sharing information—can translate to a bombardment of communication. E-mails, social media, text messages, voice mails and more may create an information overload. Personal cognitive space can become flooded with information glut.

Facility managers need to understand that there are many inherent barriers in the communication process—no matter what the message or the medium. The list of aforementioned barriers is hardly all-inclusive.



To better appreciate communication barriers, let's return for a moment to our facility manager's presentation and recommendation to replace the inefficient facility.

Example:

Following the rejection of the recommendation, the facility manager felt that the management team failed to understand the real value of the idea. Judgments were made by senior management, but not to lease a newer property. Perhaps senior management had another agenda. For example, they may have had prior knowledge of a merger that would obviate the need for the recommended action but were not in a position to tell the facility manager.

The presentation, however, might well have been the problem. In that scenario, the outcome might have been different if the facility manager would have been aware of potential barriers to communication such as frame of reference, value judgments, status effects and the absence of feedback.

People on the receiving end of any communication are filtering the message through their personalities, cultural affinities and value systems that define who they are. A facility manager who recognizes this communication reality has distinct potential in achieving intended results.

* Topic 2: Effective and Efficient Communication

Facility management and effective communication

At a basic level, effective communication requires:

- Knowing the intended audience.
- Being clear as to the purpose of the message.
- Relating the message in ways that are easily accepted and understood by the intended audience.
- Using the appropriate and multiple media to reach the intended audience.
- Soliciting feedback to confirm that the purpose was achieved.

As far back as the time of ancient Athens, the sage Greek philosopher Socrates pointed out that one has to communicate with another on the other person's terms. The above description of effective communication reinforces Socrates's tenet. Here's a closer look at each point.

Knowing the intended audience

Before communicating anything, the first consideration is the intended audience. Identify all the people who need the information you are preparing to share.

Consider the audience's background. This encompasses the gamut of education and experiential differences as well as culture and language. Given



the audience background, assess if your message is within the receiver's range of perception.

Mixed audiences (multiple disciplines and backgrounds) are almost always the rule with business teams, customer calls, organizational levels, board or executive meetings and other events. Recognizing the need to communicate with mixed audiences is especially critical when telling or selling a project to business teams or senior executives.

Knowing the intended audience, effective communication then addresses *what* the recipient needs to know and *when*.

Being clear as to the purpose of the message

Communication requires effort for both the sender and receiver; it should always have a purpose. A clear message purpose addresses the reason why you are communicating and what you want to accomplish with the communication. Are you announcing a new service to facility occupants? Are you hoping to influence attitudes or achieve consensus? Are you seeking feedback? Do you want the audience to make a decision or take action? Or do you have some combination of motives in mind?

Whether the message is intended to inform or educate, persuade or inspire, initiate action or some other motive, make clear what you're wishing to convey from the outset. People need to know in advance what you expect from your communication.

Relating the message in ways that are understandable to the intended audience

Crafting an understandable message involves tailoring the message to the audience. With a clear picture of the intended audience, ask yourself questions such as:

- How much does the audience already know about the topic?
- Does the audience need background information and, if so, how much?
- Why should the topic be of interest to the audience?
 - What aspects of the topic matter to them?
 - Are there specific benefits for audience members?
- If the intention is to persuade or initiate action, how difficult will that be for the audience to do?

Remember that different audiences may require different information. As you think about what the audience needs to know, vary your messages accordingly. When unveiling a new business continuity process, for example, strategic and financial information would be of interest to the board and senior



management. Facility staff would need to know what they need to do to support process success.

Using the appropriate media

What is the best way to communicate the message? When selecting an appropriate delivery method, consider factors such as:

- **Urgency**—whether the message is routine information, important, critical or time-sensitive.
- **Message distribution**—who needs to receive the information; the number and makeup of the receivers.
- **Physical constraints**—size of the audience, how dispersed audience members are, time zones and the technology and resources available.
- **Security/privacy/sensitivity considerations**—any legal, risk, professional, proprietary aspects.
- **Need for retention/retrieval**—whether the information should be retained and for how long plus the methods for storing, maintaining, updating, retrieving and disposing of the information.
- **Cost**—cost constraints, image and brand considerations.
- **Preference**—for example, a telephone call in lieu of an e-mail or vice versa.

Recall how many times you have received an e-mail blast (irrelevant to you) that was sent to the entire organization with the hope that the intended audience will notice it? An inappropriate media choice can dilute the message intent, lead to indifference and confusion or create many other problems.

Soliciting feedback to confirm that the purpose was achieved

Intended audience receivers should not be thought of as passive absorbers of messages. Feedback is essential in communication so you know whether the recipient has understood the message in the same terms you intended and whether he or she agrees with the message.

Check with the members of your audience. In face-to-face communication, the opportunity to observe nonverbal cues or ask and answer questions helps to assess if the intended meaning equals the perceived meaning. If not a face-to-face communication, follow-up queries and feedback received can help to determine if the communication was clear and useful to the audience.

Feedback is your audience's response; it enables you to evaluate the effectiveness of your message and whether you achieved your purpose. If



your audience doesn't understand what you mean, you can refine the message accordingly. Any opportunity to garner feedback is important in increasing communication effectiveness.

Do not neglect to consider lessons learned through feedback. To improve or sustain effective communication, consider what you will do differently the next time. Failure to do so may compromise FM credibility and the potential of receiving critical feedback in the future. As much as feasible, you should act on feedback. Be grateful for the opportunity to do so.

Putting the “Cs” in communication

There are numerous resources about effective communication available in print, published on the Web, through education and training events and so forth. A common effective communication blueprint found in many materials highlights “C” words to help create effective communication.

Exhibit 1-4 lists some typical “C” words associated with effective communication. Certainly, the list shown here is not definitive. The items presented here are intended as memory joggers and a review of basic terms that generally characterize effective communication.

Exhibit 1-4: The “Cs” of Effective Communication

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



Effective and efficient communication

Effective communication means that an intended communication made its point and is heard, understood and acted upon by those that you are communicating with (no matter the time or expense involved).

Efficient communication implies an optimized cost in terms of resources (time, money and effort) expended. For example, a facility manager may send an e-mail to several parties at once in lieu of calling or meeting with each person individually. Efficient communication is generally succinct and expends minimal resources.

However, effective communication may not be efficient and vice versa.

Examples:

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

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

Example:

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

Other elements contribute to effective and efficient communication. Next we consider the role of nonverbal communication, active listening and questioning.

(Note: Media is another factor contributing to effective and efficient communication. Chapter 3 of this competency discusses media considerations.)



Nonverbal communication

We all realize that people communicate in ways other than spoken or written words. Indeed, the nonverbal aspects of communication often indicate what someone is really feeling, thinking or meaning. Nonverbals can also affect the impressions we make on others.

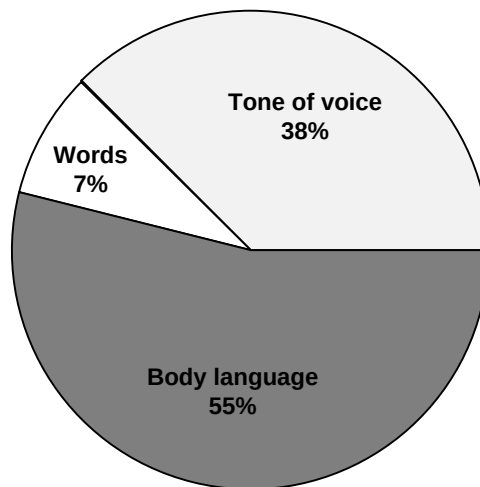
Consider the importance of a simple nonverbal cue.

Example:

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

Nonverbal communication generally describes behavior and elements of speech aside from the words themselves that transmit meaning. Information is conveyed through words, tone of voice, and body language. Exhibit 1-5 illustrates Dr. Albert Mehrabian’s pioneering research at the University of California, Los Angeles (UCLA) in the field of nonverbal communication.

Exhibit 1-5: How Information Is Conveyed



Whether these statistics are exact in all situations and cultures, the point is that a facility manager needs to be aware of nonverbal communication.

There are many types of nonverbal communication. Exhibit 1-6 overviews some of the more important nonverbal signals and cues found in Western cultures. As you review the information, keep in mind that multicultural differences in nonverbal communication—especially gestures and personal



space—are enormous and enormously open to misinterpretation. (Note: Topic 3 of this chapter is devoted to a discussion of cross-cultural communication, including global considerations.)

Exhibit 1-6: Common Nonverbal Cues and Signals

Nonverbal Cues	Implications
Facial expressions	Convey countless emotions without saying a word such as agreement or disagreement, understanding, confusion, concern and even emotions such as happiness, sadness, anger, surprise, fear and disgust.
Posture and body movements	Affect individual perceptions; influenced by the way people sit, walk, stand up, hold their head and subtle movements.
Gestures	Embellish communication in a wide variety of ways both positive and negative; expressing through gestures often occurs spontaneously and without thinking; may be substituted for words.
Eye contact	Helps maintain the flow of conversation and gauge the other person's response; communicates many things, including interest, hostility and a range of other emotions.
Personal space	Communicates interest, dominance, aggression and other emotions; differs widely depending on the culture, the situation and the relationship between the parties.
Voice	Conveys many attributes such as confidence, nervousness, authority, sarcasm, anger, boredom or understanding; encompasses rate of speech (how fast and the rhythm and flow of words), pitch (how high or low), volume, inflection, tone and even pauses intended to add interest, evoke curiosity and emphasize points.
Dress	Sends messages about who you are; influences perceptions and can either enhance or jeopardize receptivity to communication.

It is easy to underestimate the powerful impact that nonverbal communication has on the perceptions of others. Nonverbal communication says a lot about whether or not you care, if you're being truthful and how well you're listening. When your nonverbal signals match up with the words you're saying, they increase understanding, trust, clarity and rapport. When they don't, they can undermine contrary verbal or written messages and potentially generate tension, mistrust and confusion.

To improve nonverbal communication, consider the following general pointers:

- Pay close attention to nonverbal behaviors when communicating—your own nonverbal behavior and observations of others.
- Learn to coordinate your verbal messages with your nonverbal behavior so that your body language or tone of voice does not convey something



you do not want communicated or jeopardize the credibility of your message.

- Be sensitive to what others are saying nonverbally but don't overanalyze them; without verification, you may have misjudged body language.

Active listening

How would you respond if you were asked "Do you listen effectively?" Most people would say yes; very few think they need to improve their listening skills. However, there are a variety of research and theories related to listening that indicate the contrary. By one estimate, the average person remembers only between 25 and 50 percent of what they hear.

Translate that estimate to a hypothetical example in the FM world:

Example:

A facility manager's presentation to the board about regulatory compliance lasts 30 minutes. The facility manager recently learned of the aforementioned estimates about how much (or little) people remember. By those percentages, board members may retain less than half the presentation! The facility manager hopes for the best—that the key points were captured in the 25 to 50 percent. But what if they were not?

The fact is, listening is a skill most of us can benefit from improving.

Hearing versus listening

Before we examine active listening, it's important to note the distinction between hearing and listening. Many people consider the two terms synonyms, but they are not the same.

- Hearing is the first stage of listening—the physical sensation that occurs when your ears pick up sound waves that are then transported to your brain.
- Listening is part of the communication process.

Just because you hear something does not mean that you are truly listening. To really listen, you must be an active participant in the communication process.

Active listening defined

The best way to improve listening is to practice active listening. Sometimes called "empathetic listening," the tenets behind active listening are rooted in psychology and counseling; active listening was initially developed as a means to help people express themselves and talk about things that are important to them. But the principles of active listening have tremendous applicability in business communications.



It is human nature that most of us are thinking about how to respond in a conversation while the other person is communicating. We need to consciously turn that off, truly listen to what someone is saying and try to understand how they feel about what they are telling you.

Active listening is a structured form of listening and responding that focuses attention on the speaker. The listener actively absorbs the information from the speaker, showing interest in what the speaker says and providing feedback to the speaker so he or she knows the message was received.

Active listening intentionally focuses on who you are listening to—in a group or one-on-one—in order to understand what he or she is saying. As the listener, you should then be able to repeat back in your own words what the other person has said to their satisfaction. This does not mean you agree with the person but rather you understand what the individual said.

Active listening skills

Practicing active listening skills involves making a conscious effort to hear not only the words another person says but to listen and understand the complete message being sent. In active listening, you hear the message, interpret the message, evaluate the message and respond to the message.

The elements described in Exhibit 1-7 on the next page support active listening skills. These particular skills apply to face-to-face communication. The dynamics of a given situation will, of course, influence the implementation of these skills. For example, in a videoconference call, observations of nonverbal cues and signals may be limited. Similarly, conversations in a meeting environment may hinder opportunities for feedback and clarification.

Keep in mind that some of the practices may not be appropriate in all cultures. Eye contact is an example. How and when to make eye contact depends entirely on the customs of where you are, who you are with and the social setting. In most Western cultures, making eye contact is generally considered appropriate and demonstrates professionalism. However, in some cultures:

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



Exhibit 1-7: Active Listening Practices

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



The take-away here: Depending upon the culture, setting and people involved, specific active listening practices may vary.

Benefits of active listening

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

- **Creates a climate of cooperation and trust.** Through active listening, a speaker can sense sincere interest. It shows that you genuinely want to understand his or her viewpoint. Active listening helps develop a good relationship between the speaker and the listener.
- **Increases the flow of information.** Active listening tends to open people up and get them to say more. You get information you need.
- **Reduces misunderstandings.** Misunderstandings occur when there is a breakdown in communication. In active listening, because you confirm that you do really understand what the speaker has said, communication is enhanced and misunderstandings are mitigated.
- **Increases the ability to influence, persuade and negotiate.** Active listening is useful in situations where consensus and clarity are desired, where understanding is critical and in emotionally charged situations in resolving conflict.
- **Builds rapport and credibility.** When practiced effectively, active listening helps foster your reputation as a good listener. People will want to talk to you. A side benefit is that there is potential to develop new relationships. Author and poet Maya Angelou popularized a relevant sentiment originated by Carl W. Buechner (a minister who wrote quite a few well-known quips and quotes during the 20th century): “They may forget what you said, but they will never forget how you made them feel.”

If you are thinking about what to say next while a person is talking to you, you are not listening.

Example:

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

Simply put: You can learn a great deal from listening carefully.



Barriers to active listening

Given the benefits of active listening, who would dispute that it is a good skill to practice? Yet the fast pace in most organizations can easily derail the practices. Even if people know how to actively listen, they often do not for a number of reasons.

- **Presuming.** Listeners presume what the speaker will say next and think they do not need to continue listening. Listeners may begin completing the other person's thoughts and jumping to conclusions.
- **Rushing.** With other pressing commitments, a listener's mindset wanders elsewhere; listeners want to move on with their own business and do not feel they have time for the speaker.
- **Selective listening.** Information inconsistent with the listener's frame of reference or beyond a comfort zone may be ignored. Listeners pay attention only to what they want to hear.
- **Faking.** Listeners maintain an outward appearance of listening so they hold eye contact and nod to be polite, but they are not focused on the speaker's message.
- **Daydreaming.** Weariness or preoccupation with other thoughts results in mind wandering and prevents the listener from paying attention. Daydreaming is especially problematic when the subject matter is not immediately engaging for you or something said by the speaker might set off a chain of thoughts in your mind not relevant to the speaker's focus.
- **Geographic distance.** When you are not in the same location, things going on in the listener's environment that the speaker cannot control or influence jeopardize attention and listening.
- **Mobile devices.** If they are being used at the time, smartphones, tablets and other mobile devices compromise the listener's concentration and show disrespect.

(Note: Cultural differences can also inhibit active listening and are discussed in Topic 3 of this chapter, which is on cross-cultural communication. Topic 5 of Chapter 2, "Meetings," includes information on meeting dynamics that support effective communication and active listening.)

Questioning

A facility manager relies heavily on information and knowledge to fulfill his or her professional responsibilities. Asking the right questions of the right people at the right time is an important part of effective communication and information exchange. The skill of questioning also contributes to learning.

Exhibit 1-8 describes common questioning techniques, including examples and general advantages and disadvantages.



Exhibit 1-8: Questioning Formats

Examples	Advantages and Disadvantages
Open-ended questions <i>Asking the respondent for general information or to share his or her knowledge, opinions or feelings; often begin with words like “how,” “why,” or “what”; may also use the expressions “tell me” or “describe.”</i>	
• How can I help you? • Why do you think this would be the best approach? • What seems to be the problem? • Tell me what happened. • Describe the event in more detail.	Advantages: • Allows an unrestrained or free response. • Strengthens relationships by demonstrating interest in resolving concerns. • Provides opportunities to meet and exceed expectations. Disadvantages: • Can be time-consuming. • May result in unnecessary information.
Close-ended questions <i>Used to obtain specific information or to uncover needs; can generally be answered with a “yes” or “no” response, a single word or a very short response.</i>	
• Have you experienced this service issue before? • Could you be more specific? • Does this answer your question? • Is that correct?	Advantages: • Quick and requires little time investment, just the answer. • Allows you to test your understanding. • Helps to conclude a discussion or make a decision. Disadvantages: • May result in incomplete responses. • Requires more time with inarticulate users. • Can be leading and potentially irritating or even threatening. • Can result in misleading assumptions/conclusions. • Discourages disclosure.
Probing questions <i>Follow-up questions used when a response is unclear, when answers are vague or ambiguous or when there is a need to obtain more specific information or details; sometimes as simple as asking for an example.</i>	
• What exactly do you mean by ...? • You mentioned ... Could you tell me more about that? • I'm not certain what you mean by ... Could you give me some examples? • What are some of your reasons for liking/disliking ...?	Advantages: • Can help gain clarification. • Generally restrictive and can be answered in a few words. • Helps in drawing information out of people who are trying to avoid disclosing something. Disadvantages: • Cannot be planned in advance as it is impossible to know what relevant issue the person might raise and how you might need to probe to learn more. • May make the respondent defensive, result in little useful information or require additional probing.



When asking questions, what is asked and the manner in which the question is asked influence the quality of the response. To help ensure response accuracy, completeness, relevance and timeliness:

- Think about what you need to learn.
- Plan your questions beforehand if feasible.
- Try to ask mostly open questions.
- Be objective; avoid leading respondents in their answers or interjecting personal bias in your probes.
- Give the person you are questioning sufficient time to respond.
- Actively listen.

✱ Topic 3: Cross-Cultural Communication

FM and globalization

Globalization generally refers to the growing interconnectedness and interdependency of countries, people and organizations. We are no longer constrained by state or country boundaries; we have all become part of an international network.

By its nature, globalization requires a facility manager to interact with people in other countries. One of the key challenges is the need to communicate effectively with people from other cultures who often speak different languages. It is ineffective managerially, and often offensive to the other party, to gravitate to either parochialism (assuming that your cultural norms, values and practices are the *only* way to do things) or ethnocentrism (assuming that your cultural norms, values and practices are the *best* way to do things).

Cross-cultural communication defined

The phrase “cross-cultural communication” generally describes the ability to successfully form, foster and improve relationships with members of a culture different from one’s own. Cross-cultural communication is based on knowledge of many factors, such as the other culture’s values, perceptions, manners, social structure and decision-making practices, and an understanding of how members of the culture communicate verbally, nonverbally, in person, in writing and in various business and social contexts.

Yet communicating across different cultures can be a minefield for a facility manager. Sometimes even a simple miscommunication during a meeting or over dinner can derail a relationship; a misstatement included in an e-mail or a report may unintentionally ruin months of hard work. Consider but a few business cultural faux pas situations specific to cross-cultural communication.



Examples:

During negotiations, a foreigner innocently refuses an offer of a cup of coffee from a Saudi businessman. Such a rejection is considered very rude and stalls the negotiation.

During a videoconference call over the Internet, a Westerner uses the O.K. hand signal to indicate general agreement with a statement made by a Brazilian counterpart. In Brazil, the gesture does not mean “perfect.” Quite to the contrary, it is a vulgar insult.

Confusion and problems can even occur when two groups ostensibly speak the same language. For example, an expression does not necessarily mean the same thing to someone from the United Kingdom and someone from United States. Such was the case in a face-to-face business meeting to combine redundant operations in a multinational organization.

Example:

As Americans and British counterparts discussed agenda items, small points were expeditiously resolved. But the British representatives were frustrated every time they proposed to “table” a big issue. In America, “tabling” a topic means putting it off to the side; to the British it refers to putting it up for discussion. Every time the British said they wanted to discuss something, the Americans moved on.

As we see from these cultural faux pas, home country (domestic) practices often do not translate across cultures. Simply put: Cross-cultural communication is a must to mitigate cultural missteps. While it is not feasible to forecast the innumerable cross-cultural scenarios a facility manager could encounter, the text here covers the prominent challenges. Several strategies for effective cross-cultural communication are included.

The key is not to try to know all the possible cultural norms but to be sensitive to differences and thereby to change one’s communication style to a simpler, plainer form in which idiom, jargon and gesture are substantially reduced so as to make the verbal elements of the communication more effective. Perhaps the most important point is the ability to be open-minded and nonjudgmental, without losing sight of your core beliefs about what needs to be done and what constitutes good FM practice.

FM global challenges

Organizations become global when they derive a significant portion of value from cross-border trade. What often starts with trade in goods and services typically evolves to trade in knowledge, beliefs and values.

Effective communication in a domestic situation is rooted in understanding the intended audience. In a cross-cultural context, the premise is the same. Knowledge about the audience is still the key to effective communication.



At a fundamental level, a facility manager needs to understand how an organization's global management orientation influences communication. Recognition of how cultural diversity, language, religion, and legal and regulatory constraints shape communication are other important considerations.

Management orientation

The management orientation of an organization impacts organizational communication practices—what information is communicated, how it is communicated and who does the communicating. Dr. Howard V. Perlmutter, a world authority and pioneer on the globalization of firms and other institutions, is credited with introducing the ethnocentric, polycentric, regiocentric and geocentric management dimensions of global organizations. A basic awareness of how these different global organizational structures impact communication can facilitate FM operations.

- **Ethnocentric.** An ethnocentric orientation equates to an organization that is headquarters-driven. Subsidiaries have limited autonomy. Given this orientation, communications must comply with overall organizational objectives and policies.

Example:

Standards and policies from the home country are applied abroad. A facility manager from headquarters provides constant advice and counsel, the tone being that this works at home and it should be fine across international operations.

- **Polycentric.** In a polycentric orientation, the acknowledgement is made that every country is different. Each subsidiary is recognized as a distinct national entity and given some autonomy. Communications migrate toward country-specific.

Example:

FM communications espouse various local preferences and techniques that are deemed most appropriate for the host country.

- **Regiocentric.** As the name implies, regional strategies, structure and autonomy are endorsed. Because subtle country differences within a region are not always obvious, people intimately familiar with the region of operation need to be involved in communications. Nationals of the region in which operations actually take place are given more autonomy (than in a polycentric orientation) in communications.

Example:

FM communications focus on the preferences and techniques of specific geographical regions. The FM regional team adapts the communication to the cultural differences of the countries/nationals in the region.



- **Geocentric.** The geocentric orientation champions the unique contributions of all global operations. There is recognition that communication practices will differ, but there is no bias for either home- or host-country preferences in communications.

Example:

Certain standards and policies that define the organization and can integrate with local customs without offense are applied regardless of country or region.

Did You Know?

In northern European countries, there is a committed focus on natural light in the workplace for all employees, even to the point of legislated guidelines.

Cultural diversity

Culture may be defined as a shared system of values, beliefs and attitudes. Culture shapes our own actions and affects the way we perceive the actions of others.

Culture is intuitive, not logical. If asked to explain your native culture to a foreigner, could you adeptly do so? For that reason, it is unrealistic to think that you can fully understand a “foreign” culture.

Successfully navigating the complexities of cross-cultural communication requires recognizing and appreciating the differences and nuances between people of different national cultures as well as people of different geographic or ethnic groups within one country. Even if you do not have the opportunity to delve into great depth studying other cultures and subcultures, learning the basics about them is important. In some situations, learning the fundamentals about another culture can be critical.

Think about the communication process (from Exhibit 1-2). In cross-cultural communication, the sender and the receiver of the message are from different cultures and backgrounds. Cultures tend to act as filters. Cultures vary in terms of how explicitly they send and receive messages. In the United States, for example, a common business mantra is “Say what you mean and mean what you say.” But in many other cultures, communication may be more ambiguous and inexact. Learning speech patterns and contextual cues is tricky at best.



In cross-cultural communication, you must shed assumptions, prejudices and stereotypes and recognize that a person's own behaviors and reactions are a function of his or her culture. Even though they may not match your own, they are most likely culturally appropriate.

Some fundamental patterns of cultural diversity that may lead to communication difficulties include:

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

Example:

English is typically considered the international language of business. Yet there are numerous examples of people from different cultures using English for business communication who understand and express themselves based on the style each culture uses.

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

Example:

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

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

Example:

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

- **Different attitudes toward disclosure.** In some cultures, it is not appropriate to be candid and open about emotions, about the reasons behind a misunderstanding or conflict or about personal information.

Example:

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



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

Example:

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

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

Example:

Twenty seconds of silence during a meeting in some cultures is an extraordinarily long time and awkward. Vendors, for example, might perceive such silence from a facility manager during negotiations as unhappiness and tend to jump in and break the silence, oftentimes conceding points of contention. In other cultures, silence may occur in conversations without creating tension. In fact, silence could be used as means of conversation to indicate consent or acceptance.

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

Example:

A humorous story may be acceptable as a conversation icebreaker in some cultures. However, for other cultures, the same "funny" icebreaker may be offensive.

- **Different norms about "small talk."** Some cultures cherish small talk; it is a way of showing respect and being polite. Other cultures do not embrace the concept of small talk; it is seen as something awkward and unnecessary.

Example:

Small talk might take a long time in some cultures because all participants ask the same questions of each other—"How are you?" "How are the family, parents and kids?" "How is your health?" Additional topics might include work, weather conditions, politics or ongoing public issues. Yet in other cultures, asking anything about families—let alone a specific family member—would be considered intrusive and even impolite. While small talk may be the norm in some cultures, lack of small talk in others merely reflects a reserved nature and respect for another person's privacy.



The cultural diversity examples noted here are hardly exhaustive. You need to recognize that a multitude of cultural differences exist and keep them in perspective. Differences are less important than commonalities. Embracing cultural diversity ultimately promotes clearer communication, breaks down barriers, builds trust, strengthens relationships, opens horizons and yields tangible business results.

Many companies offer training in different cultures. Depending on the extent of your work with other cultures, training or seeking out a mentor may be prudent.

If training or a mentor are not viable options, many countries have government Web sites that offer cross-cultural insights and tips on international business values, etiquette, customs and protocol, regulatory requirements and more. Private Web sites offer additional information.

(Note: Check out the IFMA Facility Management Learning System online Resource Center for a link to a few such Web sites.)

Language

Conceptually, facility managers share a common language that travels across cultural boundaries—the language of FM. In practice, there are language barriers that facility managers need to overcome to succeed in cross-cultural communication.

Language is perhaps the most conspicuous part of culture. In cross-cultural communication, you must learn how to communicate with individuals and groups whose first language, or language of choice, differs from your own.

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

Yes, there are some distinct challenges in learning to speak a second language. For example, people often speak several dialects or different forms of the same language within countries and regions. In some cultures, there are variations in language usage based on religion, gender or age. There are nonstandard forms of language to contend with, such as slang, euphemisms and idioms.



In spite of the challenges, there are compelling benefits for being proficient in a second language:

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

In today's global business environment, your ability to talk to others and gather information beyond the world of your native tongue will help you expand your personal horizons and become a responsible citizen. It's never too late to connect with other cultures through another language.

Religion

The influence of religion is another major consideration in cross-cultural communication. Religion dictates many things, including rituals, holy days, dress and foods that can be eaten. Religious beliefs also influence codes of ethics and moral behaviors that carry over in the workplace. In some cultures, for example, business activities may be delayed during a workday for prayers or business dinners are scheduled later in the evening so participants may first attend to evening prayers. Best practice is to embrace diversity when dealing with individuals of a faith that may be very different from your own.

Legal and regulatory constraints

Just as facility managers must develop an appreciation of cultural, language and religious differences, they must also appreciate the influence of the legal and regulatory systems in all the countries and regions in which the organization operates. Policies, negotiations, contracts, and other communications may have to comply with multiple legal systems.

Examples:

A global organization with headquarters in Brazil must follow Brazilian laws about working conditions. If it has offices or facilities in China and the United States, it must also follow the legal requirements of those countries regarding workforce relations.

Global organizations located in the European Union, whose member states have harmonized their legal systems to some degree, must recognize any differences that might exist between the European Union and its individual member states. The working of the Acquired Rights Directive is a good example.



Some global organizations must also be mindful of extraterritorial laws—those laws that extend certain legal requirements of a home country to the activities of its citizens traveling abroad and its entities operating in host countries. The Foreign Corrupt Practices Act and the Sarbanes-Oxley Act are typical United States examples.

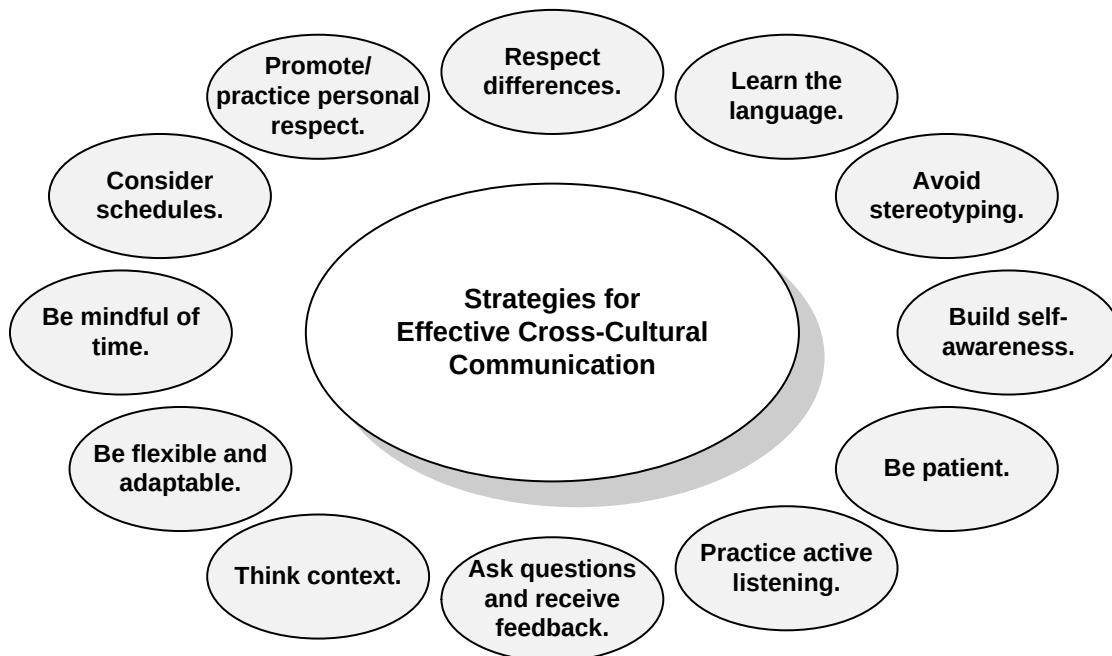
When conducting business globally, a facility manager must often predict the effect of laws or regulations on FM activities. In this area, involving expert country-specific legal counsel is strongly recommended.

Strategies for FM cross-cultural communication

Globalization has completely reshaped the flow of information, goods and services. There is no short and easy way to learn about a given culture in any depth or learn a second language. Time, work and patience are required in cross-cultural communication. You could memorize a book of do's and don'ts for a given country and still experience confusion and difficulty working with the locals.

But being cross-culturally aware is of paramount importance in helping a facility manager to minimize misunderstandings or breakdowns in communication. Exhibit 1-9 illustrates several strategies that facilitate success when communicating in cultures unlike your own. A brief explanation of each strategy follows.

Exhibit 1-9: Strategies for FM Cross-Cultural Communication



Respect differences.

Do not criticize local customs. A gift, for example, is an important symbolic gesture in some countries; in other locations, gift giving in a business setting is rare or inappropriate protocol. Learn about the culture. Ask questions to develop cultural knowledge. Study cultural differences. Be conservative and careful. Apologize if your cultural ignorance suggests lack of respect to others.

Learn the language.

Make an effort to learn a language or, at least, common phrases. Recognize that there may be different requirements between business speech for senior management or executives and words and dialogue appropriate for service providers. Avoid using jargon, slang and other nonstandard forms of your native language.

Avoid stereotyping.

Think first. Stop and suspend judgment. Learn from generalizations about other cultures, but do not use those generalizations to stereotype or be condescending and oversimplify your ideas in communication.

Build self-awareness.

Learn and practice. Put new knowledge and skills into use, because it is in the doing that you get better at cross-cultural communication.

Be patient.

In order to build a relationship, you must be willing to invest time. You must spend appropriate time nurturing a relationship and recognize when it is at an appropriate stage to move things forward.

Practice active listening.

Listen actively and empathetically. Try to put yourself in the other person's shoes, especially when his or her perceptions and ideas are very different from your own.

Ask questions and receive feedback.

Remember that many factors shape communication, interpretation of what is intended and how people behave in response. Collectively, ethnic background, education, family and personalities shape an individual and are more complicated than any cultural norm could suggest. Confirm that people understand your intentions. Check your interpretation if you are uncertain what is meant.

Think context.

Recognize the complexity of different cultures. Be of the frame of mind that this is where these people live, how they live, how the society and politics operate and so forth. Discover how important work and society are to them. Are they family-driven or work-oriented?

Be flexible and adaptable.

Keep questioning your assumptions about the "right way" to communicate. Make appropriate cultural adjustments. A practical rule is to favor the cultural norms on which a communication or transaction relies. Recognize existing cultural mechanisms necessary to get things done and be prepared to operate outside your comfort zone.



Be mindful of time. Discover how a culture perceives and values time. Change your behavior about time accordingly.

Consider schedules. Identify special holidays. Understand normal hours of operation. Accommodate time zone differences with appropriate technologies. In situations where routine (e.g., weekly) meetings are necessary with people spread across different global time zones, consider a rotating schedule.

(Note: Topic 5 in Chapter 2 provides related information about virtual and global meetings.)

Promote/practice personal respect. Try to observe and understand how personal respect works in the culture relative to age and gender.

Age is an important aspect of many cultures. For example, if age is revered in a culture, age may determine upward mobility. A young manager may not advance over more senior managers even if the younger manager is more qualified. In other cultures, if old people are considered a burden to society, business people may try to hide their age as they approach retirement.

Gender, as a cultural construct, differs from one culture to the next. Across the globe, many people strive to improve the status and quality of life of women.

Be aware of age and gender respect as it applies to a specific culture, place and political context.

Did You Know?

The concept of “face” roughly translates as “honor,” “good reputation” or “respect.” It is important to make sure you both save face for people and give it in cultures that respect face.

In China, for example, face is of utmost importance. Criticism should not be delivered in a direct or straightforward manner; it needs to be delivered with foreshadowing to ensure that the person to be criticized will be ready to accept it.

Seniority is another issue to save face in China. You should not tell a senior person he or she is wrong, especially in front of a group of people. Finding a proper way to deliver your message to the senior person (both with position or age) is critical.

Do not assume that breakdowns in communication occur because other people are on the wrong track. Search for common ground to make the communication



work rather than identifying someone to blame for the breakdown. Remember, too, that no matter how culturally sensitive you are, the FM job still has to be done economically, compliantly and on time.

Albert Einstein once said, “I never think of the future. It comes soon enough.” Confronted with the forces of globalization, many facility managers might assume that their ability to sculpt the future is minimal. They are correct that they can do little to change economic and demographic trends or other global forces. But they can improve their cross-cultural communication abilities. To ignore the possibilities puts oneself at peril.

✦ Topic 4: Issues Shaping Facility Management Communication

Organizations have experienced innumerable paradigm shifts and changes revolutionizing operations in recent years. Here we examine two prominent forces having significant influence on facility management communication:

- The exponential growth of electronic communication options
- The growth of workplace communication privacy concerns

Electronic communication

Ever-changing communication technologies, combined with new challenges confronting organizations, have inextricably linked communication and technology. More than ever, a facility manager must be able to participate effectively in all aspects of the electronic office and workplace.

Think about how your FM department uses a Web site, portal, e-mail, text messages and other technology-enabled communication to transfer information to management, occupants, service providers, visitors and others. Using technology, a facility manager can deliver information or data to employees or other stakeholders anywhere with relative ease.

Examples:

A text message or e-mail with simple or complex information can be sent to employee smartphones, tablets or both when they work in the field. There's no need to wait until the employees arrive back at the facility to communicate information.

High-quality digital still and video cameras allow a facility manager to provide high resolution pictures and video to help FM staff complete a technical task.

Real-time information can be sent to an occupant about the status of an appointment. In turn, facility occupants can communicate needs in a prompt manner.

Social media tools and technologies (such as blogs and video sharing) can help to extend FM's outreach internally and externally.



Technology is no doubt a great help for FM operations. Electronic communication typically lowers FM operating costs and often increases the department's visibility. But there are some cautions with electronic communication as well. Exhibit 1-10 identifies some of the key advantages and disadvantages of using technology in FM communication.

Exhibit 1-10: Advantages and Disadvantages of Electronic Facility Management Communication

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

Sometimes, a characteristic of electronic communication can be both an advantage and a disadvantage. For example:

- **Information availability.** Faster distribution is typically an advantage. In some situations, however, the speed with which the message is transmitted can change the structure of a message and potentially lead to misinterpretation. Care is required to ensure that data transmitted remains intact. Rich text documents, for example, can lose key symbols/marks when converted to plain text that is embedded within some software.
- **Information sharing.** Broader access to information can be an advantage. But compared to more personal communication methods, a disadvantage is that confusion or frustration may result from one-way electronic communication that limits opportunities for back-and-forth exchanges or clarification.

Technology-enabled communication tools

Technology changes have become second nature. Many people take the ongoing revolution for granted and never really consider just how much their communication depends on technology.



Exhibit 1-11 lists the vast array of technology-enabled communication tools a facility manager typically encounters. There are many ways to accomplish the same end. Although you may not use all these communication technologies today, you might have a FM application for them in the future.

The various tools are listed in alphabetical order. Keep in mind that the chart is not all-encompassing. New technology is always on the horizon.

Exhibit 1-11: Forms of Technology-Mediated Communication (continued on next page)

Form	General Organizational and FM Uses
Audio conferencing (also known as teleconferencing)	Delivers a simultaneous presentation to multiple sites distributed via audio (phone or other audio) or satellite.
Blog (short for "Web log")	• Provides an informal communication channel with stakeholders. • Allows users to create and display online posts/logs. • May include multimedia and allow readers to comment. • Can be moderated to weed out inappropriate contributions.
Book reader	• Turns a text document into an audio document. • Plays information back on the user's computer or portable device with the quality of a human-like voice.
Business portal	• Allows authorized users to access restricted content or information on an organization's Web site. • Provides a single gateway to access different applications.
Cloud computing	• Allows uploading documents and files to a network of computers that make up a cloud. • Decreases hardware and software demands on the user's side as storage and applications are handled by cloud Web portals instead. • Facilitates access and sharing of information and data.
Computer avatar	• Provides a personalized graphic file or rendering that represents a computer user. • Allows fully rendered interactive characters and/or objects in virtual worlds. • Allows Web users to load static graphics files as avatars (e.g., picture of themselves or other monikers).
E-mail (electronic mail)	• Provides a standard form of business communication, especially for short messages that require action. • Typically instantaneous and may include embedded graphics and attachments.
Electronic bulletin board	Allows users to gather information, place and read electronic messages from others and download available files.
Extranet	Provides a private wide area network (WAN) using the Internet to link an organization with stakeholders they deal with regularly.



Exhibit 1-11: Forms of Technology-Mediated Communication (continued on next page)

Form	General Organizational and FM Uses
File hosting and sharing	- Enables users to store and share documents, presentations and multimedia files with others. - Provides a modest amount of free storage; offers paid subscriptions for greater storage. - Allows media to be played/viewed from any Web browser; may be selectively available via password or open to the general public.
Instant messaging (IM)	- Consists of sending real-time messages to another Internet user through Web sites or instant-messaging applications. - Comparable to chatting in a private chat room, but instead of anyone being able to join the conversation, IM includes only people whom the user has invited. - Allows users to create a list to keep track of welcome guests; IM alerts users when a new message is received.
Intranet	- Provides an organization with a private, secured computer network system that operates on a local area computer network (LAN). - Includes Internet Web site-like navigation and functionality and features such as internal e-mail, news groups and chat facilities.
Internet forum	- Allows users to post a topic for others to review. - Allows other users to view the topic and post comments in a consecutive manner, one by one.
Live chat (for service)	- Offers service in real time or enables visitors to leave messages when offline, forwarded to e-mail. - Provides secure and private instant messaging.
Mailing list server	Automatically broadcasts e-mails to everyone on a given list.
Pager	- Provides a reliable and easy way to send out a one-time paging signal (rather than the two-way connection of a cell phone). - Works in most locations (buildings, basements and so forth); not dependent upon location. - With digital pagers, signals may be sent on redundant channels (where a signal usually goes out on two to three different frequencies with different propagation characteristics).
Podcasting	- Provides a way to publish compressed digital audio and video broadcasts (feeds) via the Internet. - Allows users to download and listen/watch on a computer or a portable device (similar to a Webcast that uses streaming).
Social bookmarking	- Provides a method for Internet users to store, organize, search, manage and share bookmarks of Web pages. - Tags/labels bookmarks so they can be sorted by topic. - Allows multiple individuals to save bookmarks on similar information to the same site.
Social media and social networking (social technologies)	- Describes a variety of online Internet technology platforms and communities that people use to communicate and share information and resources. - Provides live interaction as users can send and view updates from other users. - Can include short text-based posts, audio, video, images and other online multimedia applications.



Exhibit 1-11: Forms of Technology-Mediated Communication (concluded)

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

Technology changes are bringing about dramatic changes in business communication the world over. Green technology fuels many trends and promotes streamlining processes, paperless exchanges and more effective and efficient communication.



As organizations embrace social technologies:

- Boundaries among FM staff, customers and service providers blur.
- More employee teams use the tools to organize themselves and expedite tasks.
- Data-driven decision making has the potential to change FM processes.

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

Workplace communication privacy

Many employees believe they have a right to privacy for their individual workstations, computer files, e-mail, telephone conversations and so forth. But employers often have the legitimate right to monitor such activity and to inspect and review all related records and costs.

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

Obvious advantages of using electronic communications in the workplace were discussed in Exhibit 1-11. However, employee use of e-mail, voice mail and the Internet has created a multitude of workplace privacy problems:

- An employee's personal use of e-mail and the Internet during business hours affects the employer's productivity and profitability.
- Employee misuse of electronic communication media can place organizations at risk for legal liability and breaches of data security.
- Employers can face claims of sexual harassment, discrimination, defamation, copyright infringement and other improper conduct arising from employee misuse of computerized communications.

Additionally, employers must be concerned with protecting trade secrets and proprietary information.

Some countries and regions have regulations dealing with workplace monitoring.

Examples:

In the United States, workplace monitoring is subject to a variety of federal and state laws granting specific privacy rights to employees and placing obligations on employers, especially with regard to electronic monitoring.



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

Unionized organizations face additional restrictions. Covert surveillance without bargaining can cause significant problems. But even organizations that are not unionized may find themselves having to deal with labor boards or work councils on workplace surveillance issues.

Implications for FM

To reduce legal liabilities, organizations often set policies that reflect existing monitoring laws, business and privacy organization recommendations and research recommendations. It is incumbent upon facility managers to be aware of and comply with organizational monitoring policies. A facility manager should:

- Understand what is governed by the monitoring policy (e.g., electronic communications, telephones, voice mail, e-mail, Internet and computer use).
- Recognize that monitoring and searches can occur at any time and for any reason and be aware of company policies and restrictions.
- Understand that the organization's computer and telephone systems are the property of the organization, notwithstanding the fact that employees may have their own passwords or keys for accessing the systems.
- Understand that the organization's computers, telephones and other equipment are intended for business-related use with limited personal use considered acceptable while at work.
- Never transmit or download material that is offensive, pornographic, obscene, profane, discriminatory, harassing, insulting, derogatory or otherwise unlawful.
- Be aware of the privacy policies on Web sites you visit and how they protect or share your information.
- Never transmit or disseminate the organization's confidential information or trade secrets to any outside source.
- Not maintain any expectation of privacy while using the organization's computers, telephones or mobile devices.

Should improper staff or service provider behavior be suspected, a facility manager should involve human resources. It is not appropriate for a facility manager to undertake monitoring of his or her own accord.



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

Similarly, a facility manager should exercise good judgment and common sense with social networking. Some employers have not embraced social media in the workplace, so there may be network Web site restrictions. Whether or not an organization has social networking guidelines, a facility manager should:

- Not allow social networking to interrupt productivity (although there may be a fine line between interrupting productivity and enhancing it with social technologies).
- Be polite and responsible.
- Pause before posting.
- Be mindful of the site's privacy settings.
- Refrain from anonymity.
- Be accountable and correct mistakes.
- Use disclaimers or speak in the first person to make it clear the opinions expressed are not those of the employer.
- Remember the audience and that what is being said might create a perception about the organization and the facility management function.

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

(Note: Topic 2 of Chapter 2, "E-mail, Memos and Letters," includes more information related to privacy issues.)



Progress Check Questions

Directions: Read each question and respond in the space provided. Answers and page references follow the questions.

1. True or false? The communication process involves encoding an intended meaning into a message and the receiving and decoding of the message into perceived meaning.
- () a. True
- () b. False

Match each form of communication with its characteristic.

- | | |
|--------------------|---|
| 2. _____ Formal | a. Generally associated with interpersonal, horizontal communication |
| 3. _____ Informal | b. Fast-paced and generally moves free of organizational restraints |
| 4. _____ Grapevine | c. Routing for official messages from one level of an organization to another |
5. A facility manager assigns tasks to direct reports. The direction and flow of communication is
- () a. Downward.
- () b. Upward.
- () c. Lateral.
- () d. Network.
6. Which of the following **best** describes a potential barrier to effective communication?
- () a. Providing direct and specific feedback
- () b. Controlling information flow to curb information overload
- () c. Meeting in a room with poor lighting and uncomfortable seating
- () d. Communicating with community stakeholders through social media

7. How does having a clear message purpose contribute to effective communication?

8. True or false? When leading a meeting or speaking to a group, nonverbal cues can tell you the mood of the crowd and their reaction to your remarks.
- () a. True
- () b. False



9. Which of the following actions demonstrates active listening?
- ☐ a. Telling the speaker how you handled a similar situation
 - ☐ b. Forming assumptions about what the speaker is thinking while speaking
 - ☐ c. Thinking of counterarguments that you'll make when the speaker finishes
 - ☐ d. Showing attentiveness through body language

Match each question type with the appropriate example.

- | | |
|---------------------------------|---|
| 10. _____ Open-ended question | a. So what I hear you saying is ... |
| 11. _____ Closed-ended question | b. What examples can you give me about the heating problem? |
| 12. _____ Probing question | c. Does this information about energy billing answer your question? |

13. Which example **best** demonstrates cross-culture effectiveness?
- ☐ a. Expecting a handshake for all business introductions
 - ☐ b. Ignoring differences because they drive relationships apart
 - ☐ c. Not apologizing even if you are wrong in order to save face
 - ☐ d. Avoiding remarks that could embarrass superiors in a meeting

14. Which technology-enabled communication could be used to personalize FM service?
- ☐ a. Live chat
 - ☐ b. Business portal
 - ☐ c. Whiteboarding
 - ☐ d. Wiki



Progress check answers

1. a (p. 1-12)
2. c (p. 1-14)
3. a (p. 1-14)
4. b (p. 1-14)
5. a (p. 1-17)
6. c (p. 1-17)
7. Specific answers may vary. Generally, a clear message purpose clarifies why you are communicating and what you want to accomplish with the communication. A clear purpose addresses why anyone needs your communication and why they should pay attention. (p. 1-21)
8. a (p. 1-26)
9. d (p. 1-29)
10. b (p. 1-32)
11. c (p. 1-32)
12. a (p. 1-32)
13. d (p. 1-43)
14. a (p. 1-47)



Chapter 2: Business Communications That Achieve Results

After completing this chapter, students will be able to:

- Explain writing principles that support good business communications.
 - Use e-mail, memos and letters to communicate effectively.
 - Write effective plans and reports.
 - Design and deliver presentations that engage stakeholders.
 - Organize and run effective meetings.
 - Conduct effective negotiations.
 - Recognize copyright principles.
-

All across the globe today, facility managers will write thousands of memos, reports, proposals and plans. They will send a plethora of e-mails and text messages, design presentations, develop spreadsheets and run meetings. The list of FM communication activities goes on and on.

Most efforts will succeed in communicating the intent. However, just as likely, many others will be flawed—too wordy, disorganized, redundant, abrupt, vague or slow to make a point. Some written communication will be poorly punctuated and have spelling and grammar errors.

Courtesy of technology, bad writing unfortunately hangs around for a long time. Likewise, poor presentations can lead to negative impressions of the presenter and the subject matter. A bad meeting can waste precious time and frustrate participants. The intent of this chapter is to help you avoid such scenarios and, instead, guide you toward good business communication skills.

We will review good writing essentials and how to apply them in e-mails, memos, letters, plans and reports. Guidelines for effective presentations and meetings are also covered. Pointers on applying effective communication techniques in negotiations should improve your ability to sell your FM ideas and make things happen. Your readers and listeners should benefit, too, from what you will read about addressing stakeholder expectations and garnering their feedback. Effective writing helps them to quickly understand the intent of your communication without having to work too hard.



Examples and tips that follow are not intended to stifle your personal style but rather to make you aware of how business communication can go off track, how to avoid those pitfalls and how to communicate ideas so they achieve the result you intend—no matter who the audience is.

✦ Topic 1: Business Writing Essentials

How much information does the typical adult remember? Recall the earlier statistic from the active listening content reporting that the average person remembers only between 25 and 50 percent of what they hear.

Over the years, many other studies have postulated about our retention of information. One popularly cited reference is turn-of-the-century educator Edgar Dale's research about the "Cone of Learning," which states that after two weeks people generally remember:

- 10 percent of what they *read*.
- 20 percent of what they *hear*.
- 30 percent of what they *see*.
- 50 percent of what they *hear and see*.
- 70 percent of what they *say*.
- 90 percent of what they *say and do*.

We are not recommending memorizing these statistics. Just as there are many barriers to communication that prevent the effective exchange of information, there are a multitude of factors (e.g., status, interest, attention span, education, culture, experience and so forth) that can influence how much information is actually held in human memory.

The important take-away here is that to get action from FM stakeholders, your writing must:

- Make intended points quickly and succinctly.
- Require a minimum amount of time and effort on the part of the reader.

And, while clarity is essential, you also need to keep in mind what the audience needs to know to act on your writing—what you are trying to accomplish in the communication. Are you asking the board to act on a business case recommendation to buy a new chiller? Perhaps you are reminding FM staff about regulations that specify when to wear a protective helmet on a construction job site.

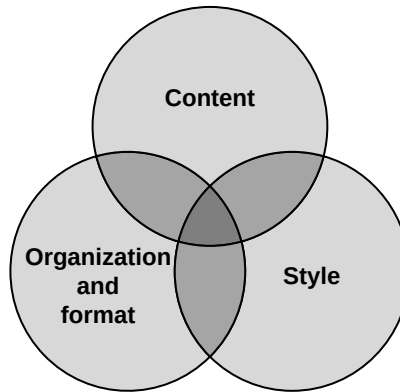
Once you are sure that you have a need to communicate information, the likelihood of getting the results you seek greatly increases if the writing is



appropriate for the audience, well-ordered and relevant so the audience can grasp the information and know what you want them to do.

Effective writing is grounded in basic principles. Volumes have been written on the topic. For the purpose of our discussion, we will cover several basic principles grouped in the categories shown in Exhibit 1-12. Master them and you will be able to handle the variety of writing tasks that come your way. Let's have a closer look at each one.

Exhibit 1-12: Effective Writing Principles



Content principles

A big challenge in most FM business communication is to express ideas in an engaging and authoritative manner that does not meander along the way.

Applying the following principles can help:

- Have a clear purpose.
- Be audience-focused.
- Include a key message.
- Stay on the message.
- Vary sentence length.
- Use plain words.
- Choose the right word.
- Use the active voice.
- Revise copy.

Have a clear purpose.

A clear purpose answers the questions:

- What is my reason for writing this communication?
- What do I hope to accomplish?
- Who is my audience?
- What are their interests?



- How much do they know already?
- What will make it easy for them to understand or act?

You will discover ideas as you write, but you will wander less by keeping the answers to these questions in mind.

For example, do you want to:

- Gain support for a change?
- Show how proactive the FM function is?
- Ensure that instructions will be followed?
- Justify actions already taken?
- Influence the reader to take some action?
- Deliver good or bad news?

Be audience-focused.

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

- Before you can influence an audience, you need to know what influences them.
- You need to communicate with the audience in a way they will understand.
- The type of information, level of detail, tone, word choice and the message all influence how the audience receives your message.
- The content must support your purpose.
- You must speak the audience's language and focus on information and issues that will matter to them, not what you find interesting or comfortable to discuss.
- If action is expected, clearly outline what you expect and make it easy for them to take action.

Examples:

In a business case to upgrade a facility HVAC system, a board will want to know what decisions need to be made and what impact they will have. The document should include facts and examples that will be meaningful to board members and support the purpose of the case. Confusing jargon should be avoided. The board should clearly understand what they need to do.

An engineering department is upgrading furniture. After meeting with the department head, the decision is made to add a few more personnel. This translates to a smaller footprint for each workstation. The facility manager should ensure that the department head communicates to his/her team that these changes are necessary. And the facility manager should provide some solutions to help with the loss of space.



In a written communication to all employees announcing a major building restacking, the audience will want to know how it will impact them and, if they are impacted, where they will be located. In the initial communication, instead of trying to tell the audience everything about the restacking project (such as final locations, schedule, what the responsibilities are of each employee who is being moved, and so forth), the facility manager chooses to simply announce the project in general big-picture terms and directs the audience to the FM department's intranet site for more detailed information.

(Note: Visit the IFMA Facility Management Learning System online Resource Center for a sample welcome document that communicates policy to facility occupants.)

Include a key message.

The key message is what you want the audience to know and remember. A key message should be clear and concise, stated at the beginning or early on. The rest of your document should provide supporting detail.

Stating a clear and concise message up front gives the proverbial “big picture.” If someone skims the document, the key message provides a compact overview of important points.

For longer documents, reports and proposals, an executive summary is an example of a key message statement. In technical papers, it's the abstract at the start of the document. But even a one- or two-page memo or letter should have a key message such as an attention-grabbing title or a powerful first sentence.

Ideally, a key message is sufficiently compelling to get the audience to keep reading. It draws them in and convinces them they should read on. How you state your key message is a function of your purpose and understanding of the audience.

Stay on the message.

A fatal weakness in many business communications is that they drift and wander. Unnecessary information obscures the bottom line.

Staying on message means:

- Maintaining a solid connection to the key message.
- Skipping unrelated or loosely related subjects.
- Ensuring that any supporting data can be linked back to the key message.

Vary sentence length.

Everyone supposes he or she varies sentence lengths. The truth of the matter is that sentences written by most untrained writers, regardless of the level of their formal education, tend to vary only slightly.

The problem is often intensified when educated people must write about technical or business topics. They tend to write lots of long sentences and do



not vary sentence length enough. That can be two strikes against the writer (and the reader).

How long is a long sentence? And how short is a short sentence? We cannot offer definitive statistics. A general guideline for business writing is to keep most sentences between 15 and 20 words. However, you do not want to write all sentences within that range. Such a style would become monotonous. A combination of both long and short sentences creates good variety and pace.

Whether you write a long or short sentence is mostly a matter of judgment. There can be well constructed long sentences that are easy to understand. Conversely, there can be poorly worded short sentences that are confusing or seem juvenile.

When trying to strike the right mix of long and short sentences in your copy, consider the tips shown in Exhibit 1-13.

Exhibit 1-13: Tips for Varying Sentences

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

Use plain words.

When choosing your words, your objectives should be precision and clarity. Unfortunately, a common pitfall in business writing is trying to be clever and impress readers with long words.

This is not to say you should ban long words or technical terms from your writing if they have precise meaning that no short words can duplicate. But small words are generally clearer and easier to understand. Recall that the point in writing is to communicate clearly. Using overly complicated or abstract terms violates that basic premise and sets up communication barriers.



Exhibit 1-14 shows several complicated terms and their simpler counterparts. Such a list could go on and on, but these examples should sufficiently demonstrate the idea of using a short or informal word instead of a long one that means the same thing.

Exhibit 1-14: Tips for Avoiding Verbosity

Avoid This ...	When You Could Say ...
Considerable	Much
Correspondence	Letter
Currently	Now
Despite the fact that	Although
Finalize	Finish
In as much as	Because
In lieu of	Instead
In my opinion, I think	I think
In the not-too-distant future	Soon
Initiate	Start
Perform an analysis of	Analyze
Prior to	Before
Provided that	If
Utilize	Use
With regard to	About

(Note: Jargon is discussed in upcoming content on style principles.)

Choose the right word.

There are many words that writers misuse in business communication. We cannot cover all of them here, but some of the words and phrases that are perpetual problems in FM communication include the following.

accept/except

- *Accept* means to receive.
- *Except* means to exclude.

affect/effect

- *Affect* (as a verb) is to influence. *The change will affect occupant satisfaction.*
- *Effect* (as a verb) is to cause something to occur. *He said the changes were designed to effect an improvement in department morale.*
- *Effect* (as a noun) means result. *The effect was overwhelming.*



can/may

- *Can* implies ability.
- *May* implies permission.

continual/continuous

- *Continual* means recurring frequently.
- *Continuous* means without interruption.

data

- In the past, *data* was used as the plural of *datum*, and it is still treated as plural in scientific writing. However, it is becoming more common to treat *data* as singular. *The data is backed up on a daily basis.*

e.g./i.e.

- *e.g.* means for example. *Department policies all have short names (e.g., absenteeism, dress code, safety, vacation).*
- *i.e.* means in other words or that is. *He prefers short sentences (i.e., nothing longer than 20 words).*
- To eliminate any confusion, you might consider writing out *for example* or *that is* instead of using *e.g.* or *i.e.*

Hopefully

- *Hopefully* means filled with hope or in a hopeful manner. To say *Hopefully the change fixes the problem* makes no sense, because it implies the change is filled with hope. Beware of using *hopefully*.

insure/ensure/assure

- *Insure* is associated with financial matters; *ensure* expresses an idea about how something is to be made certain; *assure* guarantees something. *I assure you that if you insure the property, you will ensure that the organization is protected against loss.*

irregardless

- *Irregardless* is not a word. Use *regardless*.

preventive/preventative

- There is, in fact, no difference in meaning between *preventive* and *preventative* in standard English. However, many grammar usage guides criticize *preventative* as improper, because of discord with classical Latin roots. In FM-speak, you should use *preventive*, as in preventive maintenance.



principal/principle

- *Principal* refers to rank or importance.
- *Principle* is a guiding rule.

The message: Make sure you know the precise meaning of every word you write.

Organizational style guides often cover word use. Style books that you can readily purchase include additional problem words like those explained here.

(Note: Organizational style and style books are discussed at the end of this business writing topic.)

Use the active voice.

Voice indicates the relationship between a sentence's subject and its verb. In writing it is generally better to use active voice than passive voice. In active voice, the subject acts. In passive voice, the subject is acted upon. Passive writing is often roundabout and, sometimes, downright confusing. To avoid this, learn how to spot passive verbs and make them active. Most of your sentences should use a "who-does-what" order. By leading with the "doer," you automatically avoid a passive verb.

Put a "doer" before the verb:

Examples:

Passive

The ventilation problem was analyzed by the HVAC contractor.

Service is provided to occupants in the form of custom-designed solutions.

Gas transportation cost savings were realized through regular vehicle maintenance.

Complete uniforms must be worn by all personnel.

Active

The HVAC contractor analyzed the ventilation problem.

We provide occupants with custom-designed service solutions.

Regular vehicle maintenance cut gas transportation costs.

All personnel must wear complete uniforms.

The change in voice does not alter the meaning of a sentence, but it does shift its emphasis. In the first active example, the emphasis is on the HVAC contractor. Active voice makes the HVAC contractor the center of interest. In



the passive example, the ventilation problem—not the contractor—is the center of interest.

Active voice adds energy to writing and makes sentences less formal and more conversational. That is why it's called *active*.

Passive writing tends to be wordy. Typically, active voice uses fewer words than passive. Consider the third example above on gas transportation costs. The passive version uses 10 words; the active version uses seven.

Just as some long words are appropriate, some passive sentences can be useful. In instances when the subject is not your main concern or you intentionally want to conceal the subject, a passive sentence is appropriate. A classic example of concealment is “Mistakes were made.” Think about how many times you have heard that statement to hide exactly who was responsible for the mistakes.

The composition lesson here is twofold:

- Active voice is preferred.
- Consider the subject matter, the audience and your goal when deciding if passive voice is acceptable.

Revise copy.

Many professional writers would tell you:

editing

Part of the joy in writing is ~~changing~~ ^{editing} one's own copy.

It's not about the *quantity* of words you can write; it's about the *quality* of the words. Writing well does not mean writing more. It takes time to write well. Revising copy is a critical part of writing.

When you finish your first draft, set it aside (if time allows) so you can look at it again with a fresh perspective. Review your copy and check for the obvious faux pas: punctuation, grammar and spelling. Pay attention to particular words that are spelled correctly but are the wrong word (for example, *their* for *there* or vice versa). Read through the document to ensure that you have addressed all the composition pointers we just covered. If time allows, have another person read your content. You should also check for organization, format and style principles (covered next).



Revising copy typically requires more than one pass through the material. Think of it as putting the finishing touches on your work. Slipshod writing, however minor the errors are, can undermine your efforts and give a reader who spots those errors reasons to question how much care and thought you put into the copy. Worse yet, your audience may disregard the message.

Revision has been described as an art. Writing and revision boil down to the art of getting the words right.

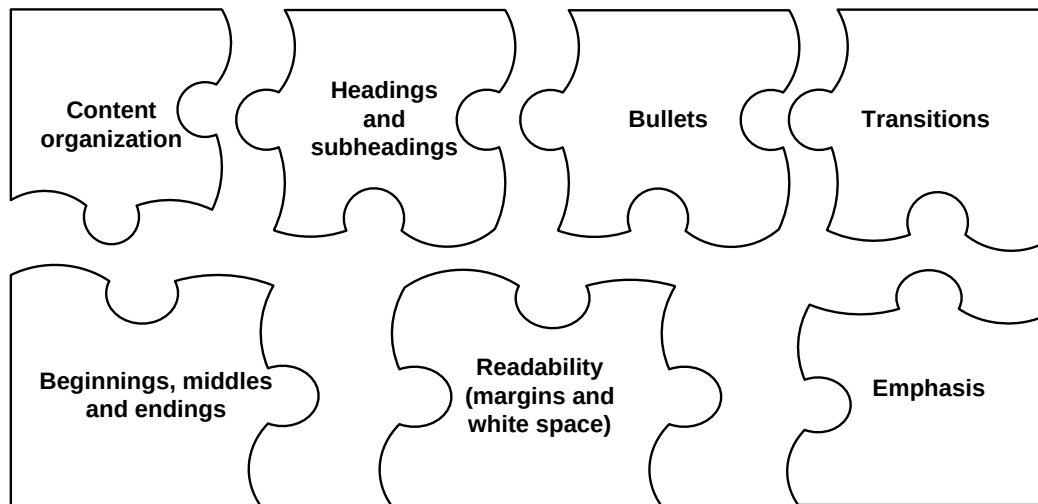
Organization and format principles

Frequently a great difference exists between the words you need in order to understand something yourself and the words you need to communicate the same thoughts to someone else. This requires the ability to “walk in the shoes” of your audience. Doing that requires empathy, which cannot be taught. What can be learned, however, is how to put down the right words with the right emphasis in a logical sequence with effective introductions, summary points and transitions. Equally important is presenting thoughts in a visually pleasing manner.

This is where organization and format come in; they are absolutely essential properties in good business writing.

Exhibit 1-15 illustrates effective principles of organization and format. Text following the exhibit describes each principle.

Exhibit 1-15: Effective Organization and Format Principles



Like solving a complicated puzzle, there’s a great sense of satisfaction when your words come together and you have a business communication piece that resonates.



Content organization

Let's take a moment and visit a facility manager.

Example:

A goal identified in an organization's strategic plan is to become energy-efficient. The vice president of operations has assigned the facility manager the task of writing a document that analyzes the rising electrical costs at the property and suggests a plan to become more energy-efficient. The facility manager knows what to write but ponders how to present the information sensibly and logically.

To some degree, we've all been in the same spot as this facility manager. No matter how great your content is, if you do not structure the information so it's compelling and easy to read, you will fail to influence the audience. They may not even take the time to read what you wrote. Both you and our facility manager can benefit from outlining content before starting to write.

Creating a simple topical outline helps to organize the content so it's reader-oriented. Even something sketchy serves the purpose.

When you outline content:

- Start with what is important to the audience (not what matters to you).
- Order the material as the audience would logically think about the subject.

In Exhibit 1-16, we see an example of how our facility manager might outline the content.

Exhibit 1-16: Sample Outline Format of Key Topics

Controlling Energy Costs at XYZ	
I. Overview	IV. Due diligence actions
A. Why something must be done	A. Projected capital expenditure
B. Current energy costs	B. Intended (anticipated) results
C. Percent of the facility and property budget	C. Alignment to organizational objectives
D. Potential savings that can be realized from taking action	D. Return on investment
	E. Financial risks
II. Where the organization uses energy	V. Action plan
A. Lighting costs	A. Next steps
B. Natural gas expenses	B. Time frame
C. Trends with current costs	C. Responsibilities
III. How to reduce costs	
A. Efficiency	
B. Conservation	



Another way to organize content is to phrase topics as a series of questions. A series of main questions and secondary questions replaces the roman numerals and capital letters in the outline shown in Exhibit 1-17.

Exhibit 1-17: Sample Outline Format with Key Questions

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

Once you have the outline done, ask yourself:

- Are these all the topics and subtopics that need to be covered?
- Are the topics in a logical sequence?
- Is there any unnecessary information that could be cut?
- Is there a clear beginning, middle and end?

There are different ways to organize content. Consider the audience and the purpose of the communication. Then determine a structure that fits the material. Remember, senior management may read only the first paragraph.



In our example, the facility manager knows his audience and the need for bottom-line information. But you may find yourself in situations where you are not familiar with an audience. Sometimes you may need to write a single document that will go to multiple audiences.

Exhibit 1-18 describes common ways you can organize information, including examples of when they are appropriate to use.

Exhibit 1-18: Content Organization Approaches

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



The example outlines (shown in Exhibits 1-16 and 1-17) follow the problem/solution format:

- Rising electrical costs at the property are the problem/need.
- Energy efficiency and conservation are the solutions.
- Alignment to organizational goals, reduced energy consumption and cost savings are the benefits.

The problem/need should be clearly stated in the introduction, the supporting facts should follow in the body, and the required action and cost should be in the conclusion.

Headings and subheadings

Headings and subheadings serve several important purposes:

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

Headings separate major sections, and subheadings convey key ideas. You can differentiate headings and subheadings with different type fonts, type size, capitalization and indentation.

Depending on the document, the audience and your personal style, headings and subheadings may be:

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

Bullets

Bullets are used in listings unless the items are in a clear sequence or order. In the latter case, numbers are used. Software allows you to choose from a variety of preset bullet formats and icons.

Bullet points:

- Add variety in text.
- Give readers a break from repetitive or dense paragraphs of text.
- Can emphasize important points.



Here are a couple of guidelines for when you use bullet points.

- **Keep items in a bulleted or numbered list parallel.** Make all of the bullets fragments, sentences or questions. However, if you have two sets of bullet points in a document, you do not need to make them consistent with each other, just within themselves.
- **Punctuate bullets consistently.** Organizational style guides (discussed under the next subhead, “Style principles”) often specify rules. One scheme for punctuating bullets is as follows.

When the lead-in is *a complete sentence* and *the bullets are phrases*, the lead-in ends with a colon, the bulleted text starts with upper-case letters and there are no periods after the bulleted text.

Example:

There are four types of work in a typical office:

- Heads down
- Collaborative
- Learning
- Socialization

When the lead-in is *an incomplete sentence* that is *completed by the bullets*, the lead-in ends with a colon, the bulleted text starts with upper-case letters and there are periods after the bulleted text.

Example:

In a balanced fire safety solution, features that need to be considered include:

- Means of escape.
- Fire alarm and automatic fire detection.
- Behavioral response of occupants.
- Fire development and containment.
- Structural response to fire.

When the lead-in is *a complete sentence* and *the bullets are complete sentences*, the lead-in ends with a colon, the bulleted text starts with upper-case letters and there are periods after the bulleted text.

Example:

There are several ways to acquire space for our headquarters:

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



Transitions

Transitions help a reader follow the sequence of ideas from sentence to sentence and paragraph to paragraph. Without transitions, readers can have difficulty seeing the linkage between ideas or the writing may seem choppy.

Example:

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

Example:

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

Reread the sentences, omitting the transitions.

- In the first example, without *consequently*, the link between property expenses and reduced working capital requirements would not be explicit.
- In the second example, without *for instance* and *but*, the text is choppy.

Exhibit 1-19 shows several examples of transitional words and phrases, listed in alphabetical order.

Exhibit 1-19: Transitional Words and Phrases

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

While transitions can be useful, they are often overused. Use transitions only when they accurately present the relationship between what precedes and what follows.

Beginnings, middles and endings

Up to now, content has described how words, sentences, paragraphs and transitions support what you write. However, for written communication to be effective, it also has to be coherent at a broader level. It has to flow from the beginning, maintain the flow through the middle and come together by the end.



The beginning

There are different ways to write openings in documents. We have already mentioned the use of some specific techniques such as executive summaries, abstracts, problem statements and attention-grabbing titles.

Great beginnings are what you make them. We cannot cover all possible scenarios. But when you write a lead or opening, it should:

- Introduce the main or central points.
- Get things rolling or set the stage for movement.

Asking a question is often an effective opening technique as is providing an interesting fact. Sometimes, starting at the end is the best way to sharply define what you want people to remember and you can then craft the beginning and middle. Whatever opening technique you use, the beginning should ideally make the reader want to read more.

The middle

The most important thing about the middle section is that it should support and carry out what was promised at the beginning. Middle section content should logically develop the opening information.

At the same time, the middle should not drag or succumb to meandering. During editing, it's not uncommon to find weak points or unnecessary information that you can eliminate from the middle.

When editing, you may also discover that the middle contains excellent points and/or topics that you never really intended to discuss when you started. If that happens, be objective. Consider if the additional information would be more appropriate for another communication piece. If you decide the information is important to include, you may need to revise the beginning to set the stage. However, do not yield to the temptation to leave the information in just because it's good.

The end

The ending is the last chance a writer has to ensure that a communication is coherent. The beginning and middle text may be clear, but often there's a need to wrap it up with some type of an ending.



Depending upon the type of FM communication, a few possible techniques include:

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

The ideal ending is brief and does not merely rehash what the reader just read in the beginning and the middle. It should provide coherence and unity.

Readability (margins and white space)

A dense page of type with narrow margins is difficult to read and uninviting to the reader. Margins and white space improve readability.

Computer document templates take the guesswork out of margin width. Normal preset margins are one inch on the top and bottom and left and right margins. One-inch margins attractively frame content on a page and make the text easier to read and absorb. Be careful if you shrink margins below one inch as you may inadvertently jeopardize the communication.

Simple indented blocks of text (as used in this document for examples) can set off text with additional white space and add visual appeal. Indented text also works well for long quotations.

Emphasis

In face-to-face communication, there are several ways to instill emphasis (e.g., active listening and questioning techniques and nonverbal gestures). Obviously, those techniques do not work for the printed word. As a writer, however, you do have other options to emphasize words, thoughts, ideas, issues, key points and so forth.

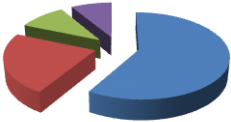
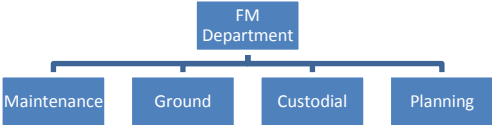
Exhibit 1-20 on the next page notes several techniques you can use to emphasize information in your print copy.

Techniques should be chosen carefully based on legibility and appropriateness. They should support a businesslike appearance and provide emphasis without being distracting. They should not be overused (e.g., excessive boldface or italic type). Make sure that any text, boxes, charts and graphics done in color will read as well in black and white, as your audience may not have access to a color printer.

White space alone makes a page enticing. White space and attractive pages of text with appropriate emphasizeers make the page irresistible to a reader.



Exhibit 1-20: Techniques That Provide Emphasis in Print

Technique	Examples						
Font choice (typeface and point size)	11 point Times New Roman is used in the body of this text. 20 point Times New Roman is used for chapter titles. 14 point Arial is used for heads. 11 point Arial is used for subheads. 10 point Arial is used in most exhibits.						
Bold and <i>italic</i> text	20 point Times New Roman bold is used for chapter titles. 14 point Arial bold is used for heads. 11 point Arial bold is used for subheads. 10 point Arial bold is used in exhibit titles. <i>Italic</i> is sometimes used to set off examples or words in the body of the text.						
Boxes	Text boxes allow you to set off quotes and key messages and summarize interesting points. Text boxes can be positioned anywhere in the document.						
Tables	Using tables in the text can be a more effective way to present certain types of information rather than writing paragraphs of information. Tables break up the monotony of dense text. Gray screens can highlight headers, key words, sentences or paragraphs. Tables also work well to emphasize logical steps. <table border="1" style="margin-left: auto; margin-right: auto;"> <tr> <td>Step 1</td><td>Outline content.</td></tr> <tr> <td>Step 2</td><td>Write a draft.</td></tr> <tr> <td>Step 3</td><td>Edit the draft.</td></tr> </table>	Step 1	Outline content.	Step 2	Write a draft.	Step 3	Edit the draft.
Step 1	Outline content.						
Step 2	Write a draft.						
Step 3	Edit the draft.						
Graphics	Numbers, processes and other information that lend themselves to a graphic presentation can facilitate understanding and retention and add impact. Graphics are useful for a variety of situations, such as showing the relationship of parts to a whole, comparisons, organization and so forth. Seasonal FM Expenses  ■ 1st Qtr ■ 2nd Qtr ■ 3rd Qtr ■ 4th Qtr  <pre> graph TD FM[FM Department] --> Maintenance[Maintenance] FM --> Ground[Ground] FM --> Custodial[Custodial] FM --> Planning[Planning] </pre>						



Style principles

How would you describe your writing style? Engaging? Conversational? User-friendly? Direct? Forceful? Perhaps some other term describes your style.

It's hard to succinctly describe style. Case in point, think about a favorite newspaper you read. What is it about the newspaper's style that appeals to you? Is it because the first sentence in articles (the story lead in journalism parlance) is compact and crisp? Maybe it's because the paragraphs are short and easy to read.

Your business writing style is shaped by many factors—the audience, your choice of words, sentences, paragraph structure and more. Really, style is an amalgamation of all the composition, organization and format principles you've just read about.

FM communication is also driven by organization style and specific style conventions. We cannot cover every style rule or guideline, but we will take a look at some of the important ones: abbreviations, capitalization, jargon, clichés, and political correctness.

Organizational style

First and foremost, you must adhere to your organization's branding and style conventions. Design and logo guidelines are standard. Organizations set up rules about how the logo may be used, for instance, or what colors are acceptable in written communication. Being aware of these standards is imperative for communication with the board and senior management. They also make you look professional in any communication with other stakeholders.

Many organizations provide standard templates for spreadsheets, written documents and e-mails. Most have a standard style guide for the words in your written documents.

Such style guides are, of course, organization-specific. An organizational style guide might advocate a particular writing style (e.g., loose and conversational or formal and rigid). It may simply be a list of acceptable acronyms. Some style guides are hundreds of pages; others fit on a page or two. The key thing you need to understand is that a style guide defines the important words and conventions for your organization that must be handled in the same way every time.

Style books

In addition to organizational style guides, there are many excellent commercial resources that you can use as a reference for all your written work. Keep in mind that different style books may have different conventions for the same style principle. A simple but significant example is that some style books recommend a single space after a sentence while others suggest two spaces.



In developing basic style guidelines, IFMA bases their conventions on *The Associated Press Stylebook and Briefing on Media Law* (usually called the *AP Stylebook*). We are not endorsing a particular publication here but rather trying to make the point you should own a style book and refer to it as needed.

Abbreviations

Abbreviations save time by eliminating the need to write out a lengthy title or phrase repeatedly. A few general do's and don'ts apply to their use.

- Include the abbreviation in parentheses the first time you use the term.

Example:

work order system (WOS)

- Then use only the abbreviation with subsequent mentions of the word.
- Use only the abbreviation if it is so common that it is recognized by the audience as standard.

Example:

O&M

- Write the abbreviation first, followed by the written-out form, if the abbreviated form is more common than the spelled-out phrase.

Example:

SPC (statistical process control)

- Do not overload copy with abbreviations, as they can confuse readers outside the FM department, your organization or the facility management profession.
- Do not use an apostrophe when writing the plural of an abbreviation.

Examples:

OEMs and RFPs

- Do not assume that your audience knows the abbreviations in your industry; abbreviations may have different meanings in other industries.

Acronyms

An acronym is a shortened word, derived from the initial letters of the words in a set phrase or series of words.

Examples:

move, add, change (MAC)

International Organization for Standardization (ISO)



Like abbreviations, acronyms are usually written in all caps without periods. However, unlike abbreviations, which are pronounced letter by letter, acronyms are pronounced like words.

Acronyms are useful because they replace longer expressions. Caution should be exercised when using acronyms, because the acronym may not be readily understood by everyone, particularly in written/spoken English, or it may have an entirely different meaning in another language.

Capitalization

A few rules apply to capitalization:

- Do not capitalize words to emphasize importance.

Write this ...

The FM department goal is to provide value and quality.

Turn off the lights when you are the last one out the door.

... Not this

The FM department goal is to provide Value and Quality.

TURN OFF THE LIGHTS WHEN YOU ARE THE LAST ONE OUT THE DOOR.

- Capitalize the official names of organizations, government agencies, divisions and departments.

Write this ...

Australian Property Institute

U.S. General Services Administration (GSA)

Dinas Tata Kota (Town Planning Authority, India)

IFMA's Professional Development Department

- Capitalize trade names.

Write this ...

GE (General Electric), Johns Manville, Corning

Jargon

Jargon is a language, especially the vocabulary part, associated with a profession, a trade or other group. As such, jargon can be valuable. But it has an appropriate place.

Jargon is inherent in facility management. There are a multitude of specialized words in a facility manager's vocabulary for which there are no ordinary word substitutes. Jargon, however, can become a problem in communication when an audience is unfamiliar with the specialized vocabulary. Jargon can also be



misused to cover up ignorance on a topic, impress an audience or fake expertise.

The recommendation: Use only enough jargon to make your point. Avoid jargonistic babble.

Clichés

A cliché is a trite expression or worn-out word. Once upon a time, a cliché probably was innovative, clever, insightful, accurate and lively. Today a cliché drags. Clichés are distracting to the intelligent reader, and they detract from you, the writer.

Some common clichés used in business are:

- Thinking outside the box.
- Low-hanging fruit.
- Turnkey solution.

In today's world, when business letters and e-mails have to be written to audiences of different countries, there are chances of these terms not being understood. Unless the person reading the clichés is fluent in the language and understands the implied meanings, it is best not to use them. Instead, just be clear and direct.

Political correctness

Political correctness in writing means being sensitive to the feelings of readers. Most of these sensitivities have to do with gender, race, ethnic origin, sexual preference and disabilities. But there are also many other terms that have a general derogatory connotation or negative stereotype.

It is beyond the scope of this discussion to provide a checklist of terms a writer should be wary of. The list could go on for pages. Plus, words that one audience construes as offensive may be fine with another group.

To be politically correct in FM communication, you need to once again keep your audience in mind. Be considerate of their feelings and be careful with the words you choose.

Write this ...

service technician
worker
labor-hours

... Not this

repairman
workman
man-hours

The purpose in most FM communication is to get a favorable response. Try not to offend your readers with politically incorrect language. At the same time, do not forget about good writing principles or interject clumsy constructions.



In closing our discussion of business writing essentials, know that effective writing skills are invaluable assets in FM communication. Whether you are writing an e-mail, a memo, a letter or a report, developing a presentation or planning a meeting, you need to write to be understood.

As the sage Chinese philosopher Confucius said centuries ago:

If language is not correct, then what is said is not what is meant.
If what is said is not what is meant, then what ought to be done
remains undone.

✦ Topic 2: E-mails, Memos and Letters

E-mails, memos and letters are an integral part of FM communication. E-mail is fast, simple and convenient. Time zones and phone tag go away. Unlike a telephone call, memos and letters spell things out without relying on a spoken explanation.

Brevity characterizes most e-mails, memos and letters. But that characteristic should not be an invitation for sloppy writing. If you want to promote a professional image and build and sustain positive business relationships, you need to pay attention to how you use each medium to communicate.

E-mail

Put yourself in the place of this facility manager.

Example:

While checking e-mail and scanning the inbox folder, the following message from the finance director immediately pops out and creates an anxious moment.

Subject: WHAT ARE YOU DOING?

Words in an e-mail message can be misinterpreted by a reader. Consider our facility manager looking at the subject line. The use of all capital letters is often construed by the recipient as anger or screaming. Maybe the finance director was only expressing excitement. Perhaps, the “caps lock” was inadvertently turned on. Regardless, “WHAT ARE YOU DOING?” can feel a lot more accusatory than a calmer “What are you doing?”

For all the wonderful benefits of e-mail, the medium leaves some things open to interpretation (or misinterpretation). The facility manager in our example was at a distinct disadvantage, looking at the computer screen without the ability to hear the finance director’s tone of voice or observe nonverbal cues.



The message here is simple: Recipients of business e-mails expect and deserve professional communication. Applying sound writing principles and observing e-mail etiquette can help to ensure that your business e-mails get read and achieve the results you intend.

The importance of professional e-mails

The speed and ease of e-mail is a tremendous advantage of the medium. But those very attributes can quickly turn into problems as people often write what is on their mind and send the message without sufficient attention to content or composition.

Both content and composition are important for the following reasons:

- **Professionalism.** On behalf of your organization, e-mails need to convey a professional image.
- **Efficiency.** Concise e-mails get to the point and do not waste other people's valuable time.
- **Protection.** E-mail can pose organizational liability risks. E-mails can also be used to substantiate or negate a lawsuit; you should be cautious about putting anything in the written word as it could be used in a legal case.

E-mail etiquette

There are numerous etiquette guidelines and tips. Specific rules for e-mail will differ across organizations.

Exhibit 1-21 on the next page lists important e-mail etiquette that applies in most organizations. The list provides useful tips and a brief explanation of each one. The list is not all-inclusive, but such straightforward advice can support professionalism, promote efficiency and provide protection.

Additional points about e-mail merit discussion.

- **Organizational policy.** Every organization that uses e-mail should have some type of policy about the resource use. If it is written down, be sure you understand the policy. If there is no explicit policy, exercise professional judgment and discretion about proper conduct and lead by example with FM staff and colleagues.
- **Personal use.** Most organizations allow employees to use e-mail for limited personal use. Be sure you understand what is allowed and what is restricted (e.g., whether it is allowable to access Web-based e-mail using the organization's resources). Keep personal e-mail to a minimum.



Exhibit 1-21: Business E-Mail Etiquette

Tip	Why It Is Important
Respond to messages in a timely manner.	Reply to e-mails within the same working day or within 24 hours. If you cannot answer a request immediately, let the other party know when you will respond (or if you cannot respond to the item).
Write a precise subject line.	A subject line should indicate what the message is about and allow the recipient to understand the contents before reading the message. Not including a subject line could result in the e-mail being sent to a junk mail folder or being intercepted by organizational protection software as possible spam.
Create a useful, simple signature.	For business e-mails, recipients typically need your full name, title, organization name, mail address, e-mail address, Web site and business phone and facsimile numbers. Mobil phone numbers may also be appropriate to include. However, be judicious with graphic tag attachments.
Do not overuse the high priority option.	Overuse desensitizes the audience.
Use To, Cc and Bcc properly.	To: For those who need to respond to the request in your message. Cc: For those who need only to be aware of what is happening. Bcc: To keep recipient e-mail addresses confidential.
Do not use ALL CAPITALS.	All caps tends to convey anger or be equated with yelling; it can be annoying and may trigger an unwanted response in the form of a flame (angry or overly sarcastic or critical) mail.
Be concise and to the point.	Readers appreciate brevity and do not want to spend time on unrelated information.
Do not attach unnecessary files.	Large attachments can bring down an e-mail system so send only productive files that are checked for viruses.
Prioritize important files.	Attach files in order of importance, placing the important ones ahead of the less important files.
Be careful when forwarding message threads (chains).	Do not omit a message thread if it contains required/relevant information. Ensure that you do not inadvertently forward a thread containing confidential information embedded somewhere within the body text to unauthorized recipients.
Use spell-check, and proof-read the e-mail before you hit Send.	Wrong spelling, grammar and punctuation can lead to potential misunderstanding and frustration. It can create a bad impression of you and your organization.
Be careful about using abbreviations and emoticons.	Abbreviations such as BTW (by the way) or LOL (laugh out loud) and emoticons such as :- (to indicate a smiley face) or ;- (to mean a wink/light sarcasm) can be misunderstood or not understood at all.
Use "Reply to All" judiciously and only if shared communication is essential.	A message sent to five people should result in five responses. But if every recipient hits Reply to All, each person could receive 25 messages back!
Be careful with formatting (HTML tags, rich text formats and bold and italic text)	Some recipients may be able to receive only a plain text e-mail.



- **Sensitive and confidential information.** Organizations often attach disclaimers, either pre-pended or appended, to e-mail transmissions. For example, we have all seen disclaimers that warn that the content of an e-mail is confidential and intended only for the use of the recipient or that the information has been scanned by virus-checking software. Disclaimers can decrease organizational liability, but the organization is ultimately responsible for the actions of its employees, including the content of any e-mails they send. Confidential or sensitive information is very tricky, since it can be easily taken or lifted by others. Furthermore, in some countries, disclaimers do not serve as deterrents.

If you use e-mail to communicate sensitive or confidential information internally or externally, that information may be shared deliberately or inadvertently with others. Know if your organization restricts classes of information that can be transmitted by e-mail.

- **Formality.** Make sure an e-mail will not embarrass you or the organization. While e-mail may lack some of the formality of a printed communication with the organization's logo, it can be just as legally binding. If you would not put the content of a message in print or send it as a memo or letter, do not send it as an e-mail.

Rumors, gossip and other information not business-related should be kept out of an e-mail. Humor should be avoided in work-related e-mail. While there is a place for humor in the workplace, it's not an e-mail. If an internal recipient is in anyway offended by the content of an e-mail or its attachments, it may be considered as workplace harassment. Misguided attempts at humor in an external e-mail can undermine the sender's credibility and damage the organization's reputation.

- **Salutations and sign-offs.** Practice common sense with your salutation (greeting). If the e-mail is formal, start with the recipient's name, followed by a colon.

Examples:

Dear Mr. (surname):

Dear Mrs. (surname; only if you know that this is a married woman with her husband's surname):

Dear Ms. (surname, married or not):

Dear Sir/Madam:

Commas tend to indicate an informal relationship, typical of a friendly letter. When you have gotten past the formality of the initial or early



exchanges, or when you e-mail people you know, informal salutations may be used.

Examples:

Dear (first name),
Hi,
All,
Team,
Greetings,

When signing off, consider if a formal sign-off is warranted or whether you can simply put your name at the end of the correspondence (above your signature). A formal sign-off typically includes a first and last name. Depending on formality/informality, one of the following closes (or others) may be appropriate.

Examples:

Sincerely,
Yours sincerely,
Yours faithfully,
Best regards,
Best wishes,
Regards,

- **Tone.** E-mail has no body language. The recipient cannot see your face or hear your tone of voice. Choose your words carefully and thoughtfully. Assess your audience. Put yourself in the recipient's place and think how your words may come across in cyberspace.
- **Emotions.** Never use emotional words, profanity or otherwise abusive or offensive language in business e-mails. Anything you put in black and white could put you in a difficult position and could be evidence in a lawsuit. Many successful professionals hold draft e-mails for a short cooling-off period when they are agitated about the subject. This allows them to handle an issue calmly and avoid unnecessary problems or conflict.
- **Permanence.** E-mail has the features of immediacy, ready availability and ease of use; it also has permanence. E-mail management software and e-mail response tools can monitor implementation of organizational rules. Hitting delete merely deletes an e-mail from a mailbox. Deleted e-mails are retrievable from servers.
- **In-box organization.** The practices of "flagging" and sorting incoming e-mails into folders are both helpful.



Flagging () allows you to mark e-mails for follow-up. For example, you can flag items with high or moderate importance that necessitate follow-up. You can group and file flagged e-mails into folders to better manage your inbox size.

Folder management can be done automatically or manually. By setting up a rule, you can specify that certain senders' e-mails be sent to a folder. Or you can manually move e-mails into folders. Either way, sorting e-mails in folders is a valuable way to organize messages pertaining to specific projects and tasks.

When to stop e-mailing

To close the discussion of e-mail, we offer a simple reminder: *E-mail is not a conversation.*

Expecting an instant response is unrealistic because not everyone is sitting in front of a computer or carrying a wireless device with e-mail turned on. If your communication is critically important, do not rely on e-mail.

Without inflections and intonations, it's hard to convey the feeling behind your words. When trying to resolve a conflict, communicate an important business decision or discuss a delicate or complex issue, a better choice is often to pick up the phone or handle the matter in person. Similarly, when e-mails go back and forth more than three times without clarity, or if they create greater intensity and misunderstanding, consider a phone call in lieu of another e-mail response.

Lastly, while e-mail has fundamentally changed the way we interact, sometimes a few quick words over an office cubicle wall can suffice.

Memos

A memo (short for memorandum) is a common form of communication to people within your organization. A memo can range in length from a short paragraph to several pages. A memo may be sent to a single recipient or several people. Memos are often sent via e-mail, but they may also be printed and communicated via paper.

Did You Know?

In some cultures, the use of a memo can be the ultimate escalation. It is prudent to be familiar with the manner of use before you send anyone a memo.



Regardless of whom a memo is sent to and how, good memos involve all of the elements of good writing described in previous content. Here we concentrate on elements that make a memo a successful communication tool.

Purpose

Memos have different purposes. At the onset, you need to define your purpose.

In her *Guide to Managerial Communication*, author Mary Munter categorizes the purpose of memos as:

- Tell.
- Sell.
- Consult.
- Join in.

Are you announcing a new FM policy? Providing a brief update to occupants about progress on a landscaping project? Perhaps you are using a memo to communicate specific instructions to service providers about invoicing procedures. Defining your purpose frames the approach you will take in communicating with memo recipients.

Format

Many organizations have a standard format for memos. Make sure you follow any established organizational style guidelines.

In the event that no internal style standards are in place, you can choose and customize software templates or consult a business communication book or online resource.

You can also simply observe and follow characteristics of well-written professional memos that you receive.

The standard elements of a memo include:

Date
To
Cc
From
Subject or Re (short form for “regarding”)



The subject (or Re) line should be specific. As with an e-mail, a precise subject line helps a reader to identify a memo's topic and purpose quickly. Readers should not have to delve into a memo to figure it out for themselves.

Write this ...

Subject: Update on client satisfaction survey responses

... Not this

Subject: Update
or

Subject: Client satisfaction survey

Being specific in a memo subject line may take a few more words, but those words are worthwhile.

Execution

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

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

Exercise all the care and professionalism with memos that you would in other important print communications—word choice, accuracy, clarity and the other elements of good business writing.

Letters

Unlike a memo, a letter is a communication typically sent to stakeholders outside your organization. Some matters simply require a bit more formality and precision and must be printed on organizational letterhead.

Anatomy of a business letter

Letters are written for many purposes. They may be various lengths and formats, but there are certain components that go into any effective business letter. Proper business letter format makes the right impression with a recipient and enhances FM professionalism.

Similar to memos, all letters should embody the principles of good writing. If your organization has style guidelines, follow them. Software templates, business communication books or online resources can be useful in the absence of an organizational style guide.



Typical sections of a business letter are shown in Exhibit 1-22. Once you review these basic components, you can adapt them accordingly when you write a business letter.

Exhibit 1-22: Sections of a Business Letter

[Letterhead or Return Address] [Date and year] [Recipient's name] [Title] [Company name] [Address] [Address] Dear [Recipient's name]: or Dear [Recipient's name], [Subject or re:] To what this letter refers [Letter body] If a letter is only one page, type the sign-off and optional components as shown below. Otherwise, type them on the last page of your letter. (See page 2.) [Sign-off] [Written signature] [Printed signature: Your name and title] Enclosures: [Number] cc: [Name for copy] [Name for copy] [Recipient's name] [Date and year] Subject or re: [Page 2 Begin your full block continuation page two or three blank lines below the heading. Continuation pages should include at least three lines of text; otherwise, evaluate the contents of previous pages. Type the sign-off and optional components below the last line on the last page.
--



Tips for a business letter A few pointers that specifically apply to business letter writing are shown in Exhibit 1-23.

Exhibit 1-23: Tips for a Business Letter

- **Include a return address.** If you are not using letterhead, include your full business address and correct legal business name. You can also include your e-mail address or phone number if needed by your recipient. Do not write out the title, as it is included in the letter's closing.
- **Follow the appropriate month, day and year format.** The format MM/DD/YY is unique to the United States. Other countries use DD/MM/YY or YY/MM/DD. The separators may be slashes, dashes or periods. If your letter is completed over a number of days, use the actual mailing date of the letter.
- **Ensure that the recipient's name and address are correct.** Names are sacred. Misspelling makes a bad impression. A letter with a wrong address may not reach the intended recipient. Include the full name and address of the contact you are sending the letter to. Use the same name as the inside address, including the personal title.
- **Evaluate the salutation for appropriateness.** Be formal in initial communications (e.g., use Mr. or Ms. or professional titles such as Dr. or Professor or military ranks) and end with a colon. Be formal in other matters (e.g., legal and financial) that necessitate precision.

Once you decide on the title, "Dear ____" is the style for nearly all business letters. If you know the person and typically address them by their first name, it is acceptable to use only the first name in the salutation (for example, Dear Irene) and end with a comma. Less formal salutations should be used with careful judgment and discretion if the letter recipient is a close associate and the content of the letter is not overly formal.

If you don't know a recipient's gender, use a nonsexist salutation, such as "To Whom It May Concern." It is also acceptable to use the full name in a salutation if you cannot determine gender. For example, you might write "Dear Shashi Lange": if you were unsure of Shashi's gender for your business letter.

- **Use a subject line and get to the point quickly in the body.** Most times a reader wants to know at the onset (or early on) what the letter is about. Clearly stating the subject of the letter helps your recipient quickly know the context of what your letter is about.

Consider appropriate directness without being overly abrupt. Take into account your reader's limited time.

- **First paragraph**—Consider a friendly opening and then a statement of the main point.
- **Second paragraph**—Begin justifying the importance of the main point.
- **Subsequent paragraphs**—Continue justification with background information and supporting details.
- **Closing paragraph**—Restate the purpose of the letter and, in some cases, request some type of action.

On occasion, a short lead (e.g., a sentence or two) to promote a bit of goodwill may be socially and culturally appropriate. But do not go overboard; it may have the reverse effect and be perceived as annoying.

- **Avoid platitudes.** Closing statements should either wrap the letter up or indicate the response you are expecting.

Weak: I hope this sufficiently expresses my concern and that you will give this matter careful consideration.

Better: I look forward to your decision.

- **Sign off appropriately.** The sign-off should match the tone of the letter. "Regards" or "Best wishes" are personal and less formal but should be reserved for recipients that you know. Opt for "Sincerely" or other more conventional sign-offs when you need more formality. Sometimes you might just sign your name after your last sentence.
- **Include a signature.** Use your full name and job title as part of the printed signature.
- **Use optional components such as "Enclosure" and "Cc" if warranted.** If you are sending additional documents include an enclosure line; if someone else is receiving a copy of the letter include Cc (copy to the other receiver or receivers).



* Topic 3: Business Plans and Reports

Writing FM business plans and reports is not something you do every day. But both documents can have a significant impact on how the FM function is perceived by the total organization, funding and what gets done.

When you write either a plan or a report, it is imperative to target the specific audience (e.g., board, senior management or staff). It is also essential to practice all the other good writing principles this competency describes. Ignoring fundamental communication principles in either document typically leads to negative outcomes; plans do not get the action they intend and reports may go unread. On the other hand, applying effective communication practices can make a difference and result in positive outcomes.

This discussion looks at the distinctions between plans and reports and identifies the basic elements of each one.

Business plans versus reports

There are many different types of FM business plans and reports. It is problematic to attempt to provide a good generic definition of either. Chances are, a group of peer facility managers would all define plans and reports slightly differently. What they are called, the structure, content and purpose vary widely across organizations. You should follow industry best practices for the type of plan or report you write.

Plans and reports, however, do have fundamentally different purposes.

Business plans

A plan states what we want to happen. Plans are characterized by goals. In the parlance of the military, for example, a plan is generally synonymous with aim. A plan is made and then it is methodically implemented in stages with appropriate resources, all the while maintaining the aim. Most plans are confidential.

Plans may be visual and graphical representations such as blueprints, floor plans, outputs from software and so forth. Plans may be financial in scope, including one-, three-, five- and 10-year budget plans, a 20-year life cycle costing plan (capital action plan) or a five-year world class maintenance plan to move an organization from reactive to predictive. Or plans might describe an HVAC upgrade via the addition of supplemental units, a transition to energy-efficient lighting or the addition of in-house food services. The variations of plans are countless. In subsequent content, we limit our discussion to written plans.



Reports

Where a plan is forward-looking, a report often reflects on the past. In that sense, reports are true to their name and describe, or report, what has happened so far. Similar to plans, there is a wide array of FM reports.

Both plan and report documents can vary dramatically in length. There are, however, common elements that characterize each one.

Elements of plans

The audience reviewing a plan has three possible courses of action:

- Approve the plan.
- Send the plan back to FM for more revisions or more work.
- Reject the plan.

Including marginal or irrelevant content lessens the chance for approval. Plans should be tight. Stick to a purpose statement, facts, recommendations and next steps.

When writing a plan, apply the KISS (**Keep It Short and Simple**) principle. The words you write are critical, but simplicity should be a key objective and unnecessary complexity avoided.

Make a clear statement of purpose.

A plan purpose statement is akin to a goal.

Example:

The building automated controls system needs to be updated.

Provide supporting facts.

Facts should support the plan purpose. They should be accurate, relevant and compelling.

Example:

The current building automation system is outdated and parts are becoming hard to get. Also, with the new version of software, there is much more energy efficiency to be had with better control of the building systems.

When stating facts, draw conclusions or inferences from them. What are the principles the facts support? Are there patterns emerging or lessons learned?

Example:

The upgrade of the building automation controls system will cost US\$X. Based on calculated savings through energy efficiency and fewer service calls to repair outdated parts, the upgraded control will have a payback period of 3.4 years.



State clear recommendations.

In practice, a plan is a recommendation until it is approved. It must describe the steps that need to be taken and include the reasons and logic behind those steps.

Example:

Based on research, the recommendation is to upgrade our controls with our existing controls service provider. This is based on the cost saving of not having to replace the operating system on the server and the continued commitment that our current service provider has for customer service. Changing to a different service provider will mean an additional cost of US\$X and an uncertain commitment to customer service.

Identify risks and alternatives.

Plans need to be realistic. Taken at face value, some plan recommendations may seem straightforward. Most have inherent risks.

Risks and alternatives may be stated as pros and cons, advantages and disadvantages or in some other manner. The point is: Do not ignore potential risks. Identify them and provide reasonable alternatives.

Example:

To upgrade to the new system, the building will have to be taken offline; all HVAC systems will not be functioning. This work will be done over a weekend starting on a Friday night and finishing on Saturday morning. There is the potential as with any software upgrade that there will be bugs. However, given that we will be doing this upgrade over a weekend, it will allow us more time to ensure that systems are up and running on Monday morning.

Specify action steps.

We return to the purpose of a plan: *to get action*. Clearly state the action you seek. Ideally, a FM plan that addresses all the elements described here builds support for your call to action.

Example:

I ask that you approve this plan to move ahead with this project to upgrade the building automation controls system and begin saving money for the organization.

In addition to the elements covered here, plans may lead with an executive summary and/or include analysis of information and assumptions as well as a conclusion or summary. Again, the specifics of a plan will dictate appropriate inclusions.

A final note about plans: If you feel strongly that some additional information or side issues need to be mentioned, make sure you clearly identify them as secondary. Placing such information in an appendix works well.



Elements of reports

As noted previously, a report may literally report on results. It might also report on findings, risks, options and recommendations. Some reports may be adjuncts to a plan; others report on plan implementation. A report may describe due diligence results or progress on projects (such as construction of a new headquarters or the status of a relocation project), provide a year-end review (for example, an FM annual report), or document survey research or incidents. There are many other types of FM reports.

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

A report can generally be broken down into three main sections: front material, main body and back material. Exhibit 1-24 shows the variety of elements a report may include in each section.

Exhibit 1-24: Typical Elements of Reports

Front Material	Main Body	Back Material
• Title page • Letter of authorization • Letter of transmittal • Table of contents • List of figures • List of tables • List of symbols and/or abbreviations • Abstract • Foreword • Preface	• Executive summary • Introduction • Purpose • Method • Materials • Procedure • Results/data analysis • Discussion • Conclusion • Recommendations	• References • Bibliography • Appendices • Glossary • Index

A report does not need to include all the elements shown in the exhibit. It should be as concise as possible while still effectively communicating the results or status of the subject. The subject of the report, the intended audience, organizational style and other factors will determine which of these elements are included in a given report.

There are nearly an infinite number of layouts and styles that organizations use for reports. We list these elements as an example. Specific format and style will be a function of organizational standards or practice.



✦ Topic 4: Presentations

In facility management, a presentation, in its broadest sense, is a verbal report of factual information to a group. One or more people have come to listen. You have a distinct opportunity to tell a story and gather feedback, oftentimes to ask for a decision.

Is a presentation necessary? Before making any presentation you should assess if there is a more appropriate method of communication. Sometimes a message you need to communicate might be delivered in a simpler manner.

If a presentation is warranted, the form and substance will vary. A presentation may range from a formal speech with (or without) visuals and handouts to a “30-second elevator pitch” aimed at generating excitement or capturing the attention so individuals are sufficiently interested to request more information.

The adage that you never have a second chance to make a first impression is ever so true when it comes to presentations. The central purpose of any presentation is communication. To communicate effectively, you must state your facts in a simple, concise and interesting manner. An effective presentation, however, involves more than good delivery; it also involves developing a strategy that fits the audience and purpose, having good content, and organizing material effectively.

This topic examines how to make a presentation so that your message is not only heard by the audience but that the audience actually listens. Content examines adult learning styles and how they influence your ability to engage an audience. Principles for developing and making effective presentations are provided.

Understanding audience learning styles

Learning styles describe the ways individuals learn and how they process ideas. There are three distinct learning styles:

- **Visual**—People who learn best by relying on their sense of sight
- **Auditory**—People who learn best by relying on their sense of hearing
- **Kinesthetic (tactile)**—People who learn best through a hands-on approach

Most people have a primary learning style and are weaker in the other styles.

A basic awareness of these styles is particularly important when you make a presentation. You tend to present with the method in which you prefer to learn, which will then meet the learning needs of only one-third of the participants.



At the start of a presentation, you have the attention of the audience. Recognizing the preferred learning styles of audience members helps to ensure that you hold the interest of the audience and do not bore them.

To some degree, you have to accommodate each style. In practice, this can be challenging since there's bound to be a mix of visual, auditory, and kinesthetic learners in any given audience.

Exhibit 1-25 overviews each learning style and suggests how to engage them.

Exhibit 1-25: Learning Styles

Style	Learning Characteristics	How to Engage Them
Visual	• Need to see body language and facial expression to fully understand content. • May think in pictures. • Learn best from visual displays. • Often prefer to take detailed notes to absorb the information.	• Accommodate the preference for seeing. • Include materials (e.g., slides and handouts) that have pictures. • Use flip charts. • Incorporate multimedia.
Auditory	• Need to hear words and other sounds. • Prefer lectures, discussions, talking things through and listening to what others have to say. • Interpret the underlying meanings of speech through listening to tone of voice, pitch, speed and other nuances.	• Accommodate the preference for hearing. • Tell stories. • Incorporate anecdotes. • Incorporate question-and-answer sessions. • Use discussion groups (as feasible).
Kinesthetic	• Need to actively explore the physical world around them. • May find it hard to sit still for long periods and may become distracted. • Engaged by activity.	• Accommodate the preference for hands-on learning. • Move around when presenting; mingle with the audience. • Incorporate props (as warranted). • Include an icebreaker that involves physical activity (e.g., a show of hands in response to a question). • Incorporate role plays or have learners make notes on a flip chart or whiteboard.

If you know the learning style of an audience, tailor your presentation to that style. If you have a mix or are uncertain about the audience's preferred style, the best way is to provide a blend for everyone.

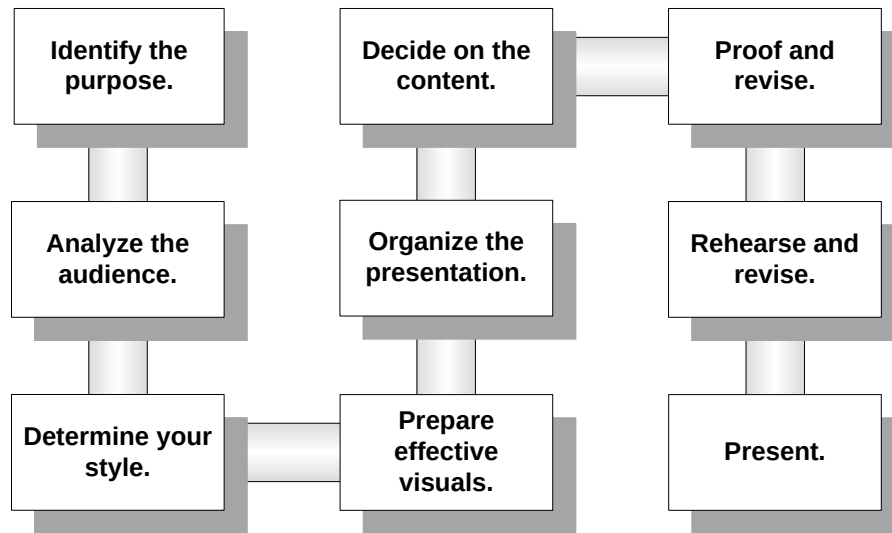


Recall the statistics about retention presented in Topic 1, “Business Writing Essentials.” Understanding all three learning styles and addressing them in a presentation helps to engage the audience. It can greatly increase the likelihood that the audience will be attentive and remember.

Developing an effective presentation

Presentations are a way to transmit information. When making a presentation, a facility manager needs substantive information to explain ideas, state opinions or put forward solutions. Following a planned development approach such as the one shown in Exhibit 1-26 can facilitate an effective business presentation. A brief explanation of each step follows the exhibit.

Exhibit 1-26: Steps to Develop an FM Presentation



Identify the purpose.

To identify the purpose of a presentation, ask yourself two questions:

- Why am I making this presentation?
- What do I want the audience to do as a result?

The three most common purposes of facility management presentations are:

- **To inform.** As the names implies, this kind of presentation informs or teaches the audience something they do not know.

Examples:

- To announce a new concierge service
- To explain different types of leases

The objective of an informative presentation is to communicate as clearly as possible but at the same time make it interesting so you gain and maintain the interest of the audience.



- **To discuss.** Another purpose of a presentation is to discuss a topic or obtain input without making a decision. Defining the problem or issue is essential.

Examples:

- To communicate budget information and solicit feedback
- To request input during a focus group about facility amenities

- **To persuade.** Persuasive presentations present sound evidence and reasoning about a topic. They also include information about how the audience should feel toward that evidence and reasoning. The main purpose is to get the audience to do something as a result of the presentation. Typical persuasive presentation objectives are either to obtain a favorable vote or decision, to reinforce existing attitudes or to change behavior or attitudes.

Examples:

- To secure approval of a plan
- To stress the importance of following building evacuation procedures
- To explore differences in cross-cultural operations and how two parties can work together for mutual benefit

In a persuasive presentation, you may use your own credibility to convince the audience to do something or you may appeal to logic and emotions.

Analyze the audience.

All the principles we have previously covered about understanding your audience in communication apply here. You need to know:

- Who are the people in the audience?
- How does the presentation subject relate to them?
- What do they already know about the subject?
- What more do they need to understand?
- What does the audience expect from the presentation?
- What should the audience take away from the presentation?

Understanding basic demographic information about the audience is important. It would be ill-advised to treat an audience as a faceless mass of listeners. For example, are there gender, cultural or educational factors you need to account for? Demographic factors will shape what you say and how you say it—the words you use, the information you cover and the examples you give. You can present information so that it is relevant to both men and women. Ethnicity, education and other demographics can all be accounted for.

Of course, it is definitely to your advantage to know if key decision makers will be in a mixed audience. While you do not want to focus content solely on a decision maker at the exclusion of other audience members, you certainly would want to target some of your remarks to them.



You may have situations where you present essentially the same content to entirely different audiences. In those instances, you need to assess how to tailor the presentation.

Examples:

Speaking about a new construction project to an audience of engineers would be vastly different than presenting the content to a city council. You would have to adapt the content differently for local community activist groups (and make even further variations for those activists depending on whether they are for or against the project).

When making a presentation to a multicultural audience, the message should be adjusted to accommodate any significant cultural variations. Consideration should be given to nonverbal communication, time sensitivities and so forth.

Understanding your audience and tailoring your presentation to the audience members will increase their receptivity to your message.

Determine your style.

Your purpose and audience will influence your style and tone and how formal or informal you are while presenting.

Ask two colleagues what they think makes an effective presentation, and you might get two very different opinions about style. For example, some people are strong proponents of telling the audience what you are going to say, then saying it and then telling them what you just said. Others maintain that this approach is predictable and boring. Some people are adamant that you should never read every word on a slide to the audience and that to do so is demeaning. Others are of the opinion that you should (without paraphrasing) and then expand on the words.

Whichever presentation style you follow, just be sure that what the audience hears reflects what they see. Disconnects between what the audience is hearing and seeing on a slide can be both distracting and confusing.

Decide on the content.

Deciding on presentation content can be challenging to many people. To circumvent any of the proverbial paralysis associated with putting down the actual words and ideas, apply the “key message” composition principles covered earlier:

- Define a key message that supports your presentation purpose and objectives.
- Stay on the message and develop the information (facts, arguments and so forth) that supports the message.



Ask yourself the following questions about the content you plan to use:

- Is it audience-appropriate?
- Will it achieve the outcome you desire?
- Are there any unnecessary details that can be cut?
- Has the content anticipated and answered questions the audience may have?
- Will the presentation neutralize any objections the audience may have?

When deciding on the content, keep in mind the earlier caution about humor. It can be high risk to include cartoons in a presentation or make attempts at humor. Poorly handled, jokes and humor in a presentation can damage or destroy your credibility and undermine your message.

Organize the presentation.

As you organize the presentation, keep in mind that everything you say, everything you show and everything you do must support the presentation purpose, move you toward your objective and be done in a professional manner.

Similar to other effective business communication, an effective presentation has three basic parts: an introduction, a main body and a conclusion. (Recall the beginnings, middles and ends in composition or the front material, main body and back material of a report.) However, the organization and elements of a presentation have some subtle differences.

We cannot cover the multitude of ways to structure a presentation introduction, main body or conclusion. Presentation purpose and subject, the audience, the venue and many other factors will influence the structure. Exhibit 1-27 on the next page provides several general guidelines and examples.

Organizing a presentation combines clear thinking and clear communication. A well-organized presentation sets the stage for your desired outcomes and action items. Your audience will benefit from a well-organized presentation, too; they will gain a clear understanding of the subject and remember more about what you had to say.

Prepare effective visuals.

Incorporating visual images with text and graphics has become a fairly common practice in presentations. While not every presentation will necessitate visuals, if they are appropriate to include, presentation software allows a facility manager to create eye-catching visuals with relative ease.



Exhibit 1-27: Organizing Presentations

Section	Guideline	Examples
Introduction	Capture the audience's attention.	• Ask a question. • State an unusual fact. • Pay the audience a professional compliment. • Give an illustration or example. • Tell a story. • Use a quotation.
	Establish WIIFT (W hat's I n I t for T hem).	Explain why understanding the subject will benefit them (e.g., inform them about something or provide facts to make an informed decision).
	Establish your credibility.	• Convey why you are qualified to make the presentation. • Talk about the knowledge, skills and experiences you have related to the subject.
	Preview the subject.	• Convey the presentation objectives. • Show an agenda. • If applicable, make mention of any presentation handouts you will distribute at the end.
Main body	Provide relevant information.	Support your presentation purpose and objectives with only relevant information; eliminate anything that is not absolutely necessary.
	Add interest.	• Include examples, quotations and definitions. • Compare and contrast points. • Provide statistics or expert testimony that support important points. • Use visuals (discussed next). • Show a media clip. • Maintain personal energy and eye contact.
	Involve the audience.	• Include a question-and-answer session. • Invite the audience to guess the answers to questions before you reveal them. • Let audience members share stories of their related experiences. • Facilitate small group discussions.
Conclusion	Finish strong and give the audience something to remember the presentation by.	• Provide a strong restatement of your proposition or reiterate the key message. • Close with a brief summary of key points. • Recommend action or suggest agreement. • Include a memorable quote. • Appeal to the audience for its understanding. • Ask for commitment or buy-in.



Good presentation visuals:

- Give a presentation a professional image.
- Help capture and hold audience attention.
- Enhance audience understanding and retention of the presentation content.
- Increase two-way interaction with the audience.

Unprofessional or poorly designed visuals, however, can have an opposite effect and detract from a presentation.

Slides, in particular, need to be planned, executed and used wisely. In Exhibit 1-28 on the next page, we offer commonsense rules for presentation slides.

Slides or other visuals should not become the focus in a presentation. They should be subordinate to your message. That is why they are called *visual aids*.

Proof and revise.

Proofing your presentation helps to ensure that you do not have any glaring spelling or grammatical errors or content omissions in visuals or handouts. Revising allows you to pare back points as necessary. Apply the KISS principle and remove any content that does not support your objectives. Trim your presentation down to the essentials.

Rehearse and revise.

Once your style and tone are set and you have proofed and revised the presentation content, it's time to practice. Practice is important for the following reasons.

- **To alleviate stage fright.** If you have stage fright, practice can help to calm your nerves. The more familiar you are with your content, the easier it becomes to project enthusiasm and confidence, which, in turn, helps establish rapport with the audience. For some cultures, practice helps to overcome shyness and nervousness.
- **To provide the proverbial “dry run.”** If you have a designated amount of time to present, practice helps to ensure that you are within the allotted time frame.
- **To make final changes.** Speaking the words out loud exposes flaws that reading does not. Practice allows you to discover awkward phrases that you did not notice when writing and editing. It also allows you to gauge your energy level, points to emphasize and so forth.



Exhibit 1-28: Tips for Presentation Slides

- **Choose a font style that is legible.**
 - Choose a font style that is easy to read (e.g., Helvetica or Arial, not fonts with fancy edges).
 - Do not use too many different fonts in a presentation; do not mix more than two fonts on a slide.
 - Use initial caps; do not capitalize all words in strings of text.
- **Use a font size that can be read from a distance.** Adhere to the following font size guidelines. (Note: These are measurements of the font on your computer screen, not projected on a screen for an audience in full-screen mode.)
 - A one-inch letter is readable from 10 feet.
 - A two-inch letter is readable from 20 feet.
 - A three-inch letter is readable from 30 feet.

When projecting slides on a screen, the larger the font, the better. Your slides must be readable, even at the back of the room. Keep in mind the following general font size recommendations.

 - 40 point for title size
 - 32 point for subtitles or bullet points

Try to keep content text 24 point or larger. Smaller fonts (10 to 14 point) are acceptable for footers.
- **Remember readability when choosing font colors.** Choose colors carefully.
 - Reds and oranges are high-energy but can be difficult to stay focused on.
 - Greens, blues and browns are mellower but not as attention-grabbing.
 - Reds and greens can be difficult to see for those who are color-blind.

Verify that shade colors used in a presentation are acceptable for both a visual presentation and a printed version of the presentation. (Sometimes colors that appear on the screen do not translate well into a printed version. For example, a dark background on a computer screen reduces glare but white text on a dark background can be hard to read from more than 20 feet away.)
- **Make titles and subtitles clear.**
 - Limit the title of a visual to one line.
 - Limit subtitles to two lines.
- **Keep text slides clean; shorter is always better.**
 - Do not have border-to-border text. (Too many words on a slide is a frequent problem.)
 - Use bullets or short sentences; bullets are talking points for reference and proper sentences are not necessary.
 - Try to keep each sentence or bullet to one line without text wrapping.
 - Limit the number of bullets on a slide to five or fewer.
- **Use graphics to support key messages.**
 - Keep the graphics clean.
 - Select the most appropriate graphic form to present qualitative information or quantitative data. Use shapes to illustrate the relationship between information; use charts to illustrate and compare quantitative data.
 - Label the key features of graphics so the audience can understand at a glance the quantitative or qualitative data shown.
- **Make slide backgrounds subtle and keep them consistent.** Choose a background template or theme that has eye appeal but does not detract from your message.
- **Be careful with animation.** Overusing animation can be distracting. Also, your animations may not be supported by software if you present off-site.



Some people find it helpful to practice in front of a mirror. Asking a colleague to listen to a presentation and provide honest feedback can also be very helpful. How you practice is secondary to the need to practice.

Check out the room or space where you are making the presentation (e.g., the room acoustics, the layout and the electronic systems you will need for support). If you are projecting slides, test your slide show to ensure that the fonts project correctly. Also, if you have embedded video in your slideshow and you copy the presentation to another location (e.g., a flash drive), be sure it functions properly.

Practice may not make your presentation perfect. But you will reap significant benefits by practicing.

Present.

In the first century A.D., Quintilian, a Roman teacher and orator, noted, “A mediocre speech supported by the power of delivery will be more impressive than the best speech unaccompanied by such power.” Over time, not much has changed. When making a presentation, a facility manager must deliver the most engaging presentation possible.

Presenting in front of a group need not be daunting. It may be challenging, but there are several things a facility manager can do to ensure a successful presentation.

While an in-depth discussion of public speaking is beyond the scope of this competency, we offer suggestions for making an effective presentation in Exhibit 1-29 on the next page. Several of these ideas reinforce the effective communication skills discussed throughout previous competency content.

A final piece of advice about presentations: Keep your audience in mind from start to finish. You may be presenting, but talk *to* your audience, not *at* them.

*** Topic 5: Meetings**

Meetings are a vital part of communication. People come together, share knowledge and information, pool resources, make collective decisions or work toward common objectives.

Not all meetings are equal. There are good ones and bad ones. A good meeting leaves participants feeling energized with a sense of satisfaction and accomplishment. Bad ones are perceived as futile, boring, time-wasting and inconvenient.



Exhibit 1-29: Making Effective Presentations

Do:	Don't
• Use visuals judiciously. • Minimize the number of slides. • Come early, check out the room and run through your slides to ensure that there are no surprise glitches. • Work to overcome stage fright. • Project a positive image (e.g., appropriate dress, posture, facial expressions, eye contact and body language). • Use concrete terms in place of abstract terms. • Use verbal “signposts” to help the audience recognize the organization and main points (e.g., first, second, third). • Keep the audience engaged (e.g., pause or ask questions). • Facilitate a question-and-answer session. • Pay attention to time. • Be ready to summarize and wrap things up if some unforeseen event pre-empts your full presentation. • Have a backup plan in the event the technology tools for an electronic presentation develop problems. • Provide handouts to attendees if warranted and within organization protocol (as some organizations advocate paper-free practices). • Provide appropriate closure at the end of the presentation (e.g., solicit a decision or review action items). • Encourage participants to contact you with any questions that they did not get answered during the presentation.	• Talk from a script. • Turn your back to the audience and read the slides. • Read words on slides verbatim; the audience can read visually four times as fast. • Use jargon and formal words (when familiar terms will suffice). • Use abbreviations unfamiliar to the audience. • Plan gestures. • Apologize for nervousness or errors.

Meetings have been described as the ultimate form of managed communication. What distinguishes a good meeting from a bad one is the preparation, the organization and the meeting structure.

The characteristics of an effective meeting are not mysterious or complex:

- They have a clear meeting purpose.
- They achieve meeting objectives.
- They take a minimum amount of time.
- They leave participants feeling that meeting was worthwhile.



Meeting purpose and objectives: the yes/no decision

The intent of this content is to help you prepare and conduct effective meetings. You will also read about how to follow up after a meeting is over. The topic ends with a general discussion of virtual meetings and global meeting challenges.

As with any form of business communication, you should first ask the simple question “Is a meeting worth the time”? If the answer is no, then you should not schedule a meeting. If it becomes evident that a scheduled meeting will serve no valuable purpose, you should cancel it.

The yes decision results when the meeting has a clear purpose and objectives.

- Do you need to communicate something important?
- Is it necessary to brainstorm ideas?
- Do you need a decision?

In facility management, there are several reasons why a meeting may be necessary. With a clear purpose and objective, you can fill in the blank and complete the following sentence: “At the end of the meeting, I want participants to _____.”

Using a facility upgrade project (final review and approval scenario) with department managers as an example, consider a few answers that would be valid responses and merit a meeting.

Examples:

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

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

Once you understand your meeting purpose and objective, preparation is the next step.

Meeting preparation

Effective meeting preparation involves thoughtful consideration of:

- Attendees.
- Format, time and location.
- The agenda.
- Roles and responsibilities.



Attendees

Who attends a meeting significantly affects the content and quality of a meeting. There are no set rules about whom and how many people to have in a meeting. That will depend on the meeting purpose and objectives. For example:

If the meeting is intended to ...

Share information with as many people as possible ...

Build consensus through interaction ...

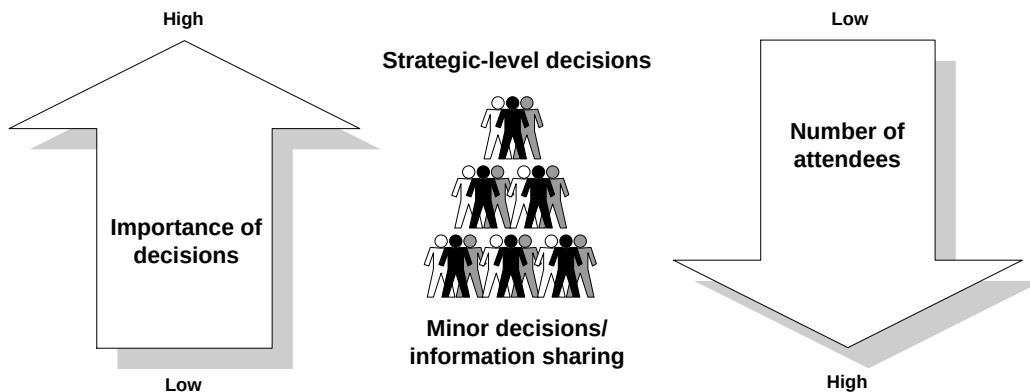
The meeting group size ...

Can be as large as necessary.

Should be evaluated (too many can limit creativity and too few can limit input and stymie outcomes).

Exhibit 1-30 shows the general correlation of the number of meeting attendees and the importance of decisions.

Exhibit 1-30: Number of Meeting Attendees



Bringing the right mix of people together prevents “groupthink,” promotes diverse thinking and facilitates well-rounded decision making.

Groupthink generally describes behavior resulting from like-minded thinking and a reluctance to share unpopular or dissimilar ideas with others. When the groupthink phenomenon occurs, meeting participants may prematurely make decisions, some of which can have lasting consequences.

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

Be sure to invite people you need to have at a meeting and confirm their attendance.

Format, time and location

Not all meetings need to be face-to-face. Chapter 1 of this competency (Exhibit 1-11) describes several technology-enabled formats that provide alternatives to face-to-face-meetings. (Virtual meetings are discussed in detail at the end of this topic.)

Regardless of the meeting format, a meeting should stipulate both a start and end time so that participants can plan their schedule and other activities accordingly.

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

Location can also influence meeting effectiveness. Common sense tells us that a good location does not guarantee a productive meeting, but a bad meeting location can set the stage for a multitude of distractions and derail potential productivity.

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

The agenda

Productive meetings require structure and planning. Once you know the meeting attendees, format, time and location, you should create an agenda.

An agenda serves several important purposes. The agenda:

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

Stated another way, an agenda helps you use time wisely.

Exhibit 1-31 lists thing to consider when you prepare an agenda.

Exhibit 1-31: Factors to Consider for a Meeting Agenda

- | | |
|--|---|
| <ul style="list-style-type: none">• Meeting type (purpose)• Priorities (issues to be discussed)• Attendees• Format• Location• Date and time• Objectives (desired outcomes) | <ul style="list-style-type: none">• Meeting pre-work (e.g., background information that must be read in advance)• Materials participants should bring to the meeting• Roles and responsibilities (e.g., who will chair the meeting, who will facilitate the meeting, who will record minutes) |
|--|---|



Depending on the meeting purpose, not all the items listed may apply. For some meetings, it may be prudent to distribute the agenda to meeting participants in advance.

In Exhibit 1-32 a sample agenda for an IFMA chapter meeting is shown.

Exhibit 1-32: Sample Meeting Agenda

XYZ Chapter Meeting—Agenda Olympic Hills Center 1900 / 07:00 PM DD/MM/YY		
Welcome/purpose	10 minutes	Evelyn
Introduction of members	5 minutes	Evelyn
Review of minutes and action items from previous meeting	5 minutes	Evelyn
Review of March facility tour report	10 minutes	Mike
20XX FMP/CFM training	10 minutes	Sandra
20XX World Workplace Conference	10 minutes	Yemi
Lecture of the month, “Maintaining the Real Estate Master Plan—Overview of Havana Estate Disaster Recovery Experience”	20 minutes	Winston
Lecture questions and answers	5 minutes	Open to all
Other issues and concerns	5 minutes	Open to all
Review of meeting action items	5 minutes	Open to all
Close of meeting	5 minutes	Open to all

Roles and responsibilities

The likelihood of having an effective and productive meeting greatly increases when certain roles and responsibilities are fulfilled. Some typical meeting roles and key responsibilities are described in Exhibit 1-33 on the next page.

Depending on the meeting purpose, how formal (or informal) the meeting structure and the size (number of participants), some of these roles will vary; some roles may be optional. Or the same person may fulfill more than one role. For example, the chair and the facilitator could be the same person; the facilitator may be the note-taker and so forth. Roles and responsibilities differ according to culture.



Exhibit 1-33: Common Meeting Roles and Responsibilities

Role	Key Responsibilities
Chairperson/chair (meeting manager)	Exercise authority to make decisions.
Facilitator	• Maintain focus on agenda. • Cultivate an unbiased and impartial environment. • Elicit participation from others and protect other members from personal attack.
Recorder (note-taker or scribe)	• Keep an accurate record (meeting minutes) of what happens during the meeting. • Record what decisions are made, how they are to be accomplished and who is responsible.
Time-keeper	Remind the group how much time is left for agenda items (if the agenda specifies time limits for individual items).
Note-keeper	Go to a whiteboard, flip chart or blackboard when a lot of ideas are being generated and make notes of what is being discussed.
Meeting participants (group members)	• Participate and contribute to meetings. • Practice active listening. • Respect other participants' views without interrupting.

Did You Know?

In the Middle East, the person who speaks least during a meeting is the person with power. The facilitator is just that—someone who handles the practicalities. A facilitator cannot demand action from other participants.

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

The meeting facilitator is essential to a good meeting. An expanded discussion of the facilitator's role is next.

Meeting implementation

When a facility manager calls a meeting, he or she may be the chairperson. More often, the facility manager will serve as the meeting facilitator (or convener). Ultimately, the role of the facilitator is based on flexibility and accommodating the needs of the group. There are several things you can do to be an effective facilitator.



If meeting participants are not familiar with you or the meeting process, you should first explain your role. As a facilitator, you do not normally get involved in the meeting content. On occasion, you might step outside your neutral role. If and when you do, make it clear to participants.

Your key job as the facilitator is to:

- Ensure that meeting ground rules are followed (e.g., people fulfill assigned roles and participants put aside any personal agendas during the meeting).
- Encourage reluctant people to speak, even if you have to employ a device such as a passing a “talking stick” from person to person (where the person holding the talking stick is the only one allowed to speak until he or she feels understood).
- Ensure that no one dominates the meeting.
- Ensure that all participants are listening and understanding.
- Legitimize participants’ perceptions and feelings.
- Check for agreement.
- Maintain or regain focus on the meeting agenda or topics being discussed.
- Help resolve any conflicts that may arise.
- Periodically summarize.
- Help to reach consensus.
- Gauge the energy level during the meeting and, if necessary, provide short break(s) during a long meeting.

Running a meeting is so much more than choosing attendees and preparing an agenda. Being an effective facilitator greatly contributes to meeting success.

Meeting ending: the action plan

A meeting should have an ending. Typical protocol is to clarify any action steps and responsibilities. Collectively, these tasks result in an action plan. A meeting may lead to great outcomes, but without an action plan those outcomes can fade away after the meeting ends. An action plan provides meeting closure, gives participants a sense of accomplishment and serves as a road map for moving forward.

Meeting participants should discuss and agree on the action plan. Think of an action plan as a document that addresses what, who and when:

- **What** needs to be done as a result of the meeting
- **Who** is responsible for each task
- **When** tasks must be completed



If meeting time allows, possible challenges or roadblocks to achieving action plan items should be discussed and who will assume responsibility for resolving those issues.

When developing action items, consider:

- Resources needed.
- Who must provide input.
- Who must provide authorization or permission.

Action items should be documented by the meeting recorder for future reference as needed. The action plan is typically distributed along with a meeting summary.

Meeting follow-up: the summary

Once a meeting ends, the follow-up begins. The specific nature of the meeting will dictate the follow-up items, but at a minimum there should be prompt distribution of a meeting summary. Within a day or two is best. A meeting summary of attendees, meeting objectives, key topics discussed, decisions made and the action plan take precedence over detailed meeting minutes.

The meeting summary and the action plan should be sent to all meeting participants. As appropriate, the meeting summary and the action plan may also be sent to other stakeholders who will be affected by the meeting outcomes and actions taken.

Meeting follow-up begets its own follow-up. Why hold a meeting and develop an action plan if people do not act on assigned items? As due dates approach, check with the people who committed to action items to see if progress is on track or adjustments are required.

Virtual meetings

Generally described, a virtual meeting takes place when two or more people meet from remote locations rather than traveling to meet in a physical room. Virtual meetings may have audio only or audio and video. A virtual meeting may be a passive presentation or an active discussion with a group, including shared documents.

Virtual meetings can be used to communicate in a variety of scenarios such as:

- A team or organization spread across multiple locations and different time zones.
- Employees working from home.
- Service providers, customers and others in different locations.



The variety of virtual meeting formats—audio conferences (teleconferences), videoconferences and Web conferences—have removed the need for people to meet face to face.

- **Teleconferences.** Cost-efficient and easily accessible, teleconferences allow people from anywhere in the world to join the same telephone call and share information.
- **Video conferences.** Video conferences are similar to teleconferences, but they allow people to see each other during a meeting. Monitors and cameras provide video feeds.
- **Web conferences.** Web conferences are virtual meetings at their pinnacle. Web conferences are typically real-time interactions that take place over the Internet using integrated audio and video, chat tools and application sharing. Anyone with an Internet connection and a Web browser can meet and collaborate online in real time. Participants can share documents, view slideshows on their computers and more. They may also have immediate access to the meeting's agenda and minutes. A well-run Web conference can be as good as a physical face-to-face meeting for informing an audience, gaining shared understanding on complex and important issues and reaching consensus on actions that should be taken.

Some Web conferencing tools require participants to install a piece of software on their own computers before they can participate; other tools are entirely Web-based. The tools differ in the features they provide for collaboration and communication. For instance, some allow participants to speak to one another through their computers' microphones, while others let everyone interact via video. Still others have an option to join the audio part of the conference by a separate audio/telephone bridge.

Many vendors offer virtual meeting services. The infrastructure, including servers and network, is hosted by the service provider.

Whatever virtual meeting format is used, a good virtual meeting solution should be easy to use and available to everyone you want to communicate with. Virtual meetings enable you to communicate almost immediately, with little concern for time and distance.



Example:

A corporate facility manager uses an online tool hosted by a service to conduct virtual meetings with staff spread across regional locations. The meeting tools are always available, allowing them to meet at convenient times. The virtual meeting environment provides live audio and video and includes an electronic whiteboard where staff can take notes. The corporate facility manager sees what they write on the whiteboard and can verify the concepts and information being addressed.

Best practices for virtual meetings

Most standard meeting rules apply to virtual meetings. In Exhibit 1-34, additional practices that can help ensure virtual meeting success are listed. Note that not all of these practices will apply in every virtual meeting scenario. Consider what is appropriate for your given virtual meeting.

Exhibit 1-34: Virtual Meeting Best Practices

Preparation	✓ Pilot-test a new Web conferencing tool before your initial meeting use to become familiar with the technology and to troubleshoot any potential glitches. ✓ Ensure that you have all meeting materials (cables, monitors and so forth) lined up in advance so precious meeting time is not wasted. ✓ Check with remote attendees the day before a virtual meeting to ensure that they have downloaded any necessary files. ✓ Send out meeting reminders. ✓ Develop an agenda and use meeting time wisely. For example, do not spend time reviewing a document that participants can read/review outside the meeting. Maximize meeting time for presenting, brainstorming and interacting. ✓ For routine (recurring) meetings, rotate the meeting roles among participants to keep everyone engaged.
Implementation	✓ Take a roll call so you know exactly who is participating. ✓ Ensure that all participants can hear/see each other. ✓ Establish ground rules for meeting conduct (e.g., how to make a comment or how to ask a question). ✓ Speak loudly and clearly. ✓ Do regular sound checks to ensure that everyone can hear, especially if they are not active meeting participants. ✓ Check with participants if the meeting gets too quiet. Be sure there are no technology issues. Ask participants if they understand (or are confused about) a point. ✓ End the virtual meeting as you would a standard meeting (e.g., with questions and answers, issues and concerns and next steps).
Participation	✓ Pay attention to tone of voice and other nonverbal clues. ✓ Adhere to good cross-cultural practices. ✓ Eliminate as many distractions as possible. ✓ Minimize background noise and interruptions.
Etiquette	✓ Be on time for the call. ✓ Wear proper business attire for your respective role. ✓ Listen carefully and pay attention to what is being presented. ✓ Be considerate. Let others speak. ✓ Do not interrupt even if you feel you have an important point to make.



The list of best practices in Exhibit 1-34 is not all-encompassing. The different virtual meeting formats, for example, have additional nuances. Consider the following specifics for teleconferencing etiquette:

During a teleconference:

- Call in from a quiet location to eliminate distracting background noise.
- If you are on a cordless phone, sit near the base of the phone to eliminate static.
- Do not put your phone on hold during the meeting; beeping, ringing or even recorded messages may interrupt the meeting.
- Be aware of whether or not your phone is on mute.
- Avoid shuffling papers.
- Identify yourself when you are speaking.

Special global meeting considerations

Running a global meeting presents unique challenges. Different levels of language proficiency are typically a factor. So are time zones. Just look at a not-so-fictional situation one facility manager must deal with.

Example:

A multinational organization headquartered in New York has operations in Hong Kong and Dubai. On the world clock, it's:

- 10:00 a.m. in New York (today).
- 10:00 p.m. in Hong Kong (today).
- 6:00 p.m. in Dubai (today).

Virtual weekly meetings are held. There are multiple people in each location. That means some staff will always need to be available in the middle of the night.

Keeping the lines of communication flowing freely during a meeting across international time zones requires that participants—no matter where they are located—believe they are part of the same virtual team. Technology-enabled communication tools help, but there are other practices that can make global meetings effective.

Implementing a rotating schedule for meetings (nicknamed “share the pain” or “inconvenience everybody equally”) distributes the time zone burden. Cross-cultural meeting effectiveness can also be enhanced by:

- Distributing an agenda ahead of time to allow participants to read and become familiar with meeting objectives and topics.
- Asking that each meeting participant be on the phone separately.

The second practice eliminates colleagues located in the same place from seeing each other and having side conversations during a meeting. Changing that dynamic requires everyone—in all locations—to focus on their words and put expression in their voice, not their face.



Running a global meeting in this manner not only maximizes Web and phone-conferencing tools; it gives all participants a meaningful voice in the meeting.

(Note: Several aspects of cross-cultural communication were previously discussed in Chapter 1, Topic 3.)

✴ Topic 6: Negotiation, Influence and Persuasion

The point has been repeatedly made throughout this competency that facility managers must work with numerous stakeholders. At any time, when several stakeholder groups work together to achieve organizational goals, there must be consensus about:

- What the goals are.
- How they will be achieved.
- What will occur if difficulties arise.

Quite often, each stakeholder group has different values and priorities that need to be addressed. As an example, consider the differing perspectives three groups within the same organization have about the replacement of a chiller:

- Senior management priorities are fiscal, monetary and bottom-line efficiency.
- Facility management priorities are technical and operational.
- Occupant interests are responsiveness, basic comfort and productivity.

The differing values and priorities often necessitate negotiation, influence and persuasion to reach an agreement that is acceptable to all parties.

Negotiation

Labor-management negotiation is perhaps the most widely discussed negotiation in business. Those types of negotiations are not the subject of this content. Here we examine the communication aspects of negotiation as it occurs in normal FM operations. The gamut of possible negotiations could be establishing service specifications for a contractor to defining desired outcomes for a landscaping project or identifying personal development goals for FM staff and much more.

(Note: The *Leadership and Strategy* competency discusses specific negotiation techniques.)

Parties in FM negotiations

The potential participants in FM negotiation are as diverse as a facility manager's stakeholders. The principals range from the board and senior management to occupants, service providers, contractors, occupants and others.



A communication difficulty often arises because the two parties in a negotiation approach the task as though there are only two sides to the situation. Quite to the contrary, there are multiple views that could be taken.

Environment for FM negotiations

The ideal environment for negotiation is one that is conducive to open discussion. Both parties should be able to see each other. A face-to-face meeting is best, although technology may be employed to facilitate the discussion.

How the discussion is structured is important. Rather than making presentations to each other, the parties should talk with each other. Active listening should be practiced so that each party can develop an understanding of the other's viewpoint.

Clarifying expectations is another key consideration in any negotiation. Each party typically comes to the negotiation discussion having a preconception about the desired outcome. Being able to step back from one's position and look at the negotiation from a broader perspective may result in the realization that there are multiple ways to achieve the same overall objective.

Influence

Influence may be generally described as a mechanism through which people change behavior and attitudes.

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

How do you successfully influence FM stakeholders? Volumes have been written about the psychology of influence. Here we can offer only succinct suggestions.

- **Realize influence is “two-way.”** As a manager, if you are not open to influence from others, you are simply attempting to apply personal power to get what you want. Openness to influence from superiors, colleagues, external service providers, customers, FM staff and others demonstrates trust and respect. It also helps you acquire knowledge.
- **Practice good communication skills.** Be an active listener. Active listening helps you understand what others have to say; it also signals that



you are eager and open to hear their perspective. Use open-ended questions to invite others to more fully express their ideas and opinions.

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

This discussion of influence is hardly exhaustive. However, collectively, these practices are fundamental ways to build trust, respect and relationships and facilitate personal influence.

Persuasion

Where influence is a subtle mechanism, persuasion is generally described as a process. Through persuasion, you change or reinforce others’ attitudes, opinions and behaviors. Persuasion is the process of making a rationale case and presenting your ideas in a manner that appeals to others, captivates their attention, sways their opinions and convinces them to align with your perspective. Persuasion might take place in a single communication or over time through a series of planned (or tiered) communications.

Persuasion is often described as an art and a science. As an art, persuasion necessitates building trust, respect and relationships. The science facet is how you collect, analyze and communicate information to stakeholders.

The core elements of persuasion are credibility, understanding the audience and communicating effectively:

- **Credibility.** Credibility is fundamentally the outcome of trust and expertise. It is human nature that if people trust you, they are more likely to consider what you say as believable and sincere. Those attributes, in turn, reinforce your appeal and increase the likelihood that others will



accept your ideas. Think about it. When you do not trust someone, the chances that you might disregard what they have to say (or at least be cautious) are greater. Similarly, when others think of you as an expert, your credibility stock goes up.

- **Understanding the audience.** Credibility will not matter unless you understand your audience (the decision makers, key stakeholders, their receptivity to what you have to say and so forth). You have to understand the people you hope to persuade and learn how they make decisions. If politics are a factor, try to understand how different people are aligned. When you understand the audience, you enhance your ability to persuade them.
- **Communicating effectively.** As you well know, even if your logic is unassailable, some people will find ways to resist it. Some objections will have no plausible explanation. But you greatly increase your chances at persuasion if what you say:
 - Is logical and supported by facts and expertise.
 - Addresses stakeholder interests.
 - Eliminates or minimizes objections or competing alternatives.
 - Recognizes and deals with any organizational politics.

The importance of negotiation, influence and persuasion

The applications for negotiation, influence and persuasion are virtually infinite in facility management. You need to present a business case for a capital expenditure ... You want to convince a supplier to expedite a shipment of parts ... You need to lobby with occupants about energy efficiency. These examples are a small sample.

Chances are that you draw on negotiation, influence and persuasion skills every day, oftentimes without even realizing it. You have a multitude of opportunities to impact decisions and advance the facility management function. Positive outcomes are readily attainable through effective negotiation and use of influence and persuasion.

* Topic 7: Copyright Principles

Why is copyright important?

Copyright law has a dual role. It provides exclusive rights to the owner of an original work and protects the work for a limited period of time. Copyright was also established to promote creativity and learning. Copyright law tries to maintain a balance between the rights of copyright owners for adequate



payment for the use of their works and the rights of society as a whole to have access to ideas and information.

What is copyright?

Copyright is a form of protection provided by laws and regulations that prevents others from printing or otherwise duplicating, distributing or vending copies of original literary, artistic and other creative expressions.

Ideas and facts themselves cannot be copyrighted; it is only the original aesthetic or artistic expression of an idea or fact that is copyrighted. Examples of copyrighted work are cartoons, blog designs, books, newsletters, magazines, trade journals, computer software, graphics, music, lyrics and written materials in paper or digital format.

In many countries and territories around the world, copyright is an automatic right. It arises when a work is created. Unlike other intellectual property rights such as patents, trademarks and industrial designs, it is not necessary to register a copyright in many countries or territories to have legal protection. Copyright is granted automatically when an original work is first “fixed” in a tangible medium of expression, including through the various means of technology. That means that material is protected by copyright at the point at which it is first printed, formed as a physical object, captured on film, drawn, or saved to an electronic file.

A copyright notice is an identifier placed on copies of the work to inform the world of copyright ownership. The copyright notice generally consists of the symbol © or word *copyright*, the name of the copyright owner and the year of first publication, for example, © 2012 John Doe.

Next we review information specific to U.S. copyright law. This topic ends with an overview of international copyright considerations.

U.S. copyright provisions

In the U.S., the Copyright Act of 1976 governs the rules and regulations for copyright. Essentially, the owner of a copyright has exclusive rights to:

- Reproduce the copyrighted work.
- Distribute the copyrighted work.
- Create derivative works or creations based on the original.
- Display the copyrighted work publicly.
- Perform the copyrighted work publicly.
- Publicly perform sound recordings by means of a digital audio transmission.



Copyright infringement

Except for certain compulsory licenses granted under the Copyright Act, it is a violation of the act to photocopy, distribute, customize, publicly perform or display a copyright owner's original work without permission. However, a person may have a fair use defense, which is discussed next.

Fair use

Fair use is the provision of the U.S. Copyright Act that allows the use of copyrighted work in certain circumstances. There are no finite guidelines as to what constitutes fair use; it is determined on a case-by-case basis in the court system when an author or owner claims copyright infringement.

Whether a use is fair depends upon following main factors:

- Purpose (commercial or noncommercial)
- Nature (critique or parody versus business flyer)
- Percentage of the copyrighted work that is used
- Amount (one or two copies versus 100)
- Effect on potential market value of the copyrighted work

While the fair-use provision will cover an excerpt that is extremely short and that has been attributed to the source, in general, pages from a book cannot be copied and used without permission.

Example:

While a facility manager could include a properly cited paragraph from a facility management text in service provider training materials, he or she could not photocopy a chapter from a book and distribute it as a handout.

The availability of fair use is substantially reduced in the for-profit business world. With respect to materials used in a training session by a for-profit enterprise, there is generally much less leeway given to what is fair use.

Returning to our example, even if the facility manager did not charge anything for the training session or materials, freely using copyrighted materials violates the law.

Public domain

Work in the public domain means that no one can invoke the Copyright Act to prevent another from copying, distributing or otherwise using the work. The public domain consists of all works that never had copyright protection and works that no longer have copyright protection. In general, copyright protection covers the life of the author plus 70 years. After those 70 years, the work passes into the public domain. The public domain also includes most works created by the United States government. All works in the public domain are free for the public to use.



In addition, a work is considered to be in the public domain if it meets one of the following characteristics:

- Published in the United States prior to 1923
- Published prior to January 1, 1978, without notice of copyright
- Published between January 1, 1978, and March 1, 1989, without notice and without reasonable effort to affix notice and registration within five years

Works in the public domain may be used freely without the permission of the former copyright owner. It is important to note, however, that other factors may prevent such acts, such as national security or a contract.

For more information about U.S. copyrights, circulars, announcements, regulations, certain application forms and other related materials, visit the U.S. Copyright Office at www.copyright.gov or the Copyright Clearance Center at www.copyright.com.

International copyright

There is no such thing as an “international copyright” that will automatically protect an author’s writings throughout the world. Protection against unauthorized use in a particular country depends on the national laws of that country or territory. Most countries and territories offer protection to foreign works under certain conditions that have been greatly simplified by international copyright treaties and conventions. There are several such treaties and conventions.

There are, however, some countries and territories that offer little or no copyright protection to any foreign works. For current information on the requirements of and protection provided, it may be advisable to consult an expert familiar with foreign copyright laws.



Progress Check Questions

Directions: Read each question and respond in the space provided. Answers and page references follow the questions.

1. Rewrite the following sentence applying good composition principles.

Upon approval of the contract, it would be our desire to commence working on the building renovation project right away.

2. True or false? Graphics should be used as much as possible in text.

() a. True

() b. False

3. Which style principle does the following sentence violate?

The facility manager volunteered to be the committee chairman.

() a. Capitalization

() b. Political correctness

() c. Verbosity

() d. Jargon

4. What is the primary benefit of keeping e-mail writing concise?

() a. Encourages swift responses

() b. Prevents overload of inbox system capacity

() c. Minimizes organizational liability

() d. Improves readability and effectiveness

5. Describe a basic distinction between a memo and a letter.



6. Describe a basic distinction between a plan and a report.

7. Which of the following presentation techniques is the **best** way to engage a visual learner?

- ☐ a. List FM terms on a slide and enunciate the words clearly.
- ☐ b. Create a highly interactive presentation.
- ☐ c. Provide opportunities for group discussion.
- ☐ d. Use circles and arrows on a slide to demonstrate a process.

8. True or false? During a small group presentation, a facility manager notices a couple of people near the back of the room who do not seem to be paying attention. A good way to engage these individuals would be to walk down the aisle and stand near them.

- ☐ a. True
- ☐ b. False

9. Which meeting practice increases the likelihood of everyone showing up on time and having the energy to focus on the meeting agenda?

- ☐ a. Having a clear meeting purpose
- ☐ b. Choosing the right attendees
- ☐ c. Scheduling
- ☐ d. Setting ground rules

10. Which of the following items would be the **most** important to include in a meeting summary?

- ☐ a. The agenda
- ☐ b. Meeting ground rules
- ☐ c. Copies of meeting visuals
- ☐ d. Key decisions made

11. In order to make maximize use of Web time in a virtual meeting,

- ☐ a. ground rules should be less stringent than for a standard meeting.
- ☐ b. participants should read a routine status report in advance.
- ☐ c. participants should use their own mobile devices to connect to the Web.
- ☐ d. questions should be submitted in advance or limited to one per participant.



12. Which practice would be the **best way** for a facility manager to earn stakeholder trust?

- ☐ a. Exercise only formal authority within a sphere of influence.
- ☐ b. Focus on internal cost cutting and information control.
- ☐ c. Exert power to obtain resources needed to fulfill responsibilities.
- ☐ d. Be candid about advantages and disadvantages as you understand them.

13. What cannot be copyrighted?

- ☐ a. Customized or derivative works
- ☐ b. Computer programs
- ☐ c. Material in the public domain
- ☐ d. An audio recording of a conference speech



Progress check answers

1. Specific answers may vary. Here's one possibility that changes passive to active, uses more familiar terms and eliminates unnecessary words: *Once the contract is approved, we want to start the building renovation project.* (p. 1-57)
2. b (p. 1-74)
3. b (p. 1-78)
4. d (p. 1-80)
5. Specific answers may vary. One basic distinction is that memos are written communication within an organization and letters are typically for external consumption. (pp. 1-84 and 1-86)
6. Specific answers may vary. One basic distinction is that plans state what we want to happen while reports describe what has happened so far. (p. 1-89)
7. d (p. 1-94)
8. a (p. 1-98)
9. c (p. 1-106)
10. d (p. 1-110)
11. b (p. 1-112)
12. d (p. 1-117)
13. c (p. 1-119)



Chapter 3: Stakeholder Expectations and Facility Management Communication Plans

After completing this chapter, students will be able to:

- Recognize principles of how to manage/oversee stakeholder perceptions and expectations.
 - Develop and use facility management communication plans.
 - Select situation-appropriate media for stakeholder communications.
-

* Topic 1: Stakeholder Expectations

Managing stakeholder expectations takes a combination of formal and informal communication, influencing skills and relationship building. Being able to manage stakeholder expectations is a critical part of FM communication.

In order to effectively manage stakeholder expectations, a facility manager must:

- Identify all the FM stakeholders.
- Understand what those stakeholders expect from FM.
- Communicate messages that appropriately address stakeholder perceptions and expectations.

In practice, these three tasks are not so black and white. Consider two significant challenges:

- Different stakeholders have different interests in FM.
- Stakeholder needs for information vary.

Soliciting feedback is a critical component of managing stakeholder expectations. Stakeholder feedback helps a facility manager to understand:

- Who needs the information?
- What kind of information is needed?
- How much information is required and at what level of detail?
- How should the information be formatted and presented?
- How quickly must the information be distributed?



Answers to these questions help a facility manager provide the right information in the right format and at the right time. The result: FM messages and communication plans are more likely to fulfill stakeholder expectations.

✦ Topic 2: Communication Plan Development

Facility management communication plans can take on many different forms. The gamut of FM communication plans ranges from comprehensive strategic plans intended to communicate FM mission and goals to stakeholders to tactical project plans designed to communicate status. Communication plans may be specific or generic in nature.

Although every communication plan is unique, there are some commonalities that distinguish an effective plan from a weak one. An effective communication plan:

- Addresses which stakeholders to target.
- Defines the purpose of the communication with each group of stakeholders.
- Identifies primary and supporting media that will be used to deliver the messages.
- Specifies the timing and frequency of the communication.
- Identifies who is responsible for ensuring that messages are created and distributed according to the plan.
- Indicates how the plan's effectiveness will be judged.

Let's consider move management to better understand aspects of a communication plan.

Example:

A move management communication plan should address all steps in a relocation and help to provide business continuity. Whether an organization is restacking, transitioning, right-sizing or clearing out an old location and setting up a new location for ten people or hundreds, a move management plan should make it easy and ensure that the business is up and running with minimal downtime.

Move management involves tiered communications. Individual stakeholders will have different needs for information. Communication is planned in advance to help ensure that the right information is given to the right people, at the right time, in the right format and with the right emphasis.



A good move management plan informs all levels in an organization—from C-suite stakeholders to the individuals moving—what they need to know about the move process:

- **Senior or executive management.** These C-suite stakeholders would need to understand costs, budget, risks, key milestones and status.
- **Department coordinators.** Communication with department coordinators should describe roles and responsibilities, plans (tasks, assignments and action items), schedule, deliverables and status.
- **Employees.** A large part of move management communication involves alleviating the concerns of employees involved and dispelling grapevine rumors. Good communication promotes an understanding of why decisions were made and facilitates a smooth transition. Before the move, employee communication should update employees on the relocation and answer as many potential questions as possible about the move. At the time of the move, communication should provide specific directions regarding packing and labeling responsibilities as well settling in the new space.

Communication plan techniques

There are many techniques that may be used to communicate a plan. Messages may be spoken, written and electronically transmitted. The specific techniques selected depend on factors such as the purpose and objectives of the specific communication, the profile of the stakeholder audience, the various advantages and disadvantages of each communication technique and the funds available.

Returning to our move management scenario, consider the different communication techniques for the C-suite, department coordinators and employees.

Example:

- **Senior or executive management.** A face-to-face meeting might be used at initiation to overview the scope of the move, budget, risks and milestones and to gain buy-in. Supporting documents could be distributed via hard copy or electronically.
- **Department coordinators.** Following an initial kickoff meeting, regularly scheduled meetings and other meetings as warranted (either face-to-face or virtual) could be used to discuss project status, review group responsibilities, coordinate schedules and so forth. E-mails could be sent as needed for general communications.
- **Employees.** Planned communication via meetings, the intranet, Web site, e-mail, newsletters and other media should be used to help address concerns and rumors regarding personal work space, storage space, facility amenities, schedule of events and more.



(Note: Topic 3 examines the advantages and disadvantages of several types of media used in communication plans.)

The importance of repetition and consistency

Organizations may hire a communication consultant and/or enlist the services of an internal public relations department to help develop and implement a communication plan. Specific to our move management examples, there are facility management consultants specializing in comprehensive move management, including all coordination, communications and connections.

Whether a facility manager expedites a communication plan internally or contracts with an external service provider, it is important to repeat the message and maintain consistency across the communication techniques used. Within a single communication plan, the primary and supporting media should be consistent in aesthetic appearance, linguistic style and tone (including facts, figures, slogans and so forth). Without this consistency, the messages will not be as effective for the intended stakeholder audience. Worse still, a lack of consistency may confuse or distract the audience.

The importance of repetition in getting a message across, and the absolute necessity of all the FM team delivering the message consistently to all their contacts, should not be underestimated. Planned repetition and consistency broaden the reach of communication, reinforce the message and expand the opportunity for a consistent understanding by the audience.

In the next series of exhibits, examples of progressive communications intended for employees in a move management scenario are shown.

- Exhibit 1-35: Sample Headquarters Relocation Employee Move Guide—a communication distributed in advance of the move as reference, intended to answer common questions about the move
- Exhibit 1-36: Sample Headquarters Relocation Personnel Checkout Form—a checklist to be completed at the time of packing for the move and shared with a departmental move coordinator
- Exhibit 1-37: Sample Headquarters Relocation Welcome Packet—a communication made available upon arrival (often left at the new desks) for the employees' reference that may include reporting of move-related issues, return of moving supplies, printer and voice mail setup and other relevant items



Exhibit 1-35: Sample Headquarters Relocation Employee Move Guide

Introduction

This guide is provided to be a handy move reference and to answer as many of your potential questions as possible about what to do in relation to your move.

Move Responsibilities

- Pack and label your contents by 5:00 p.m. on Friday, June 20.
- Leave current area clean and cleared of all items.
- Leave any keys to current furniture/cabinets in the top drawer for future occupants.

General Information

- **Before you leave**—Complete a “Personnel Checkout” form, attached with this Move Guide. This will ensure that your belongings are properly prepared for moving and setup at the new location.
- **Packing crates**—We will be providing and using plastic crates in lieu of cardboard cartons. Plastic crates provide a more efficient, environmentally friendly and secure relocation. The crates will stack four high on dollies provided with them and should be packed according to the instructions in this guide. Prompt return of the crates within one week following the move is mandatory to avoid unnecessary cost. Items already packed in cardboard cartons and boxes will be moved as-is and do not need to be repacked into a crate.
- **Computer equipment**
 - Take laptops and portable electronic devices home for the relocation.
 - Disconnect mouse, keyboard and all cables from computer equipment and place in plastic bag provided by move vendor. Place label on computer bag and all electronic items to be relocated.
- **Printers and faxes**—All personal printers should be packed and labeled with computer equipment and in the same manner. All departmental printers/copiers/faxes should be packed and labeled to go to the appropriate departmental workspace.
- **Unpacking and crate removal**—Unpacking should be completed as quickly as possible, and crates should be stacked and placed in designated areas for return to the move vendor. Please unpack crates promptly and don't write on the crates, hide them or take them home. These have been rented for the move only and return of undamaged crates will avoid additional costs (approximately US\$100 per unreturned crate!).

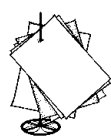
Packing and Labeling

Part 1: Packing Instructions

1. Personal items

We recommend that you take home irreplaceable personal items such as family photos, trophies and artwork prior to your scheduled move.

2. Work areas



Pack or discard all contents. You may want to use old envelopes to help organize small items such as pens, paper clips, etc.

3. File cabinets and bookcases



All file cabinets and bookcases must be completely emptied and the contents packed in crates unless otherwise directed. Please tape all keys to the top of the cabinet for the future user of the furniture.

4. Pictures, wall graphics and artwork

Pictures and artwork small enough to fit completely into a packing crate may be wrapped and moved in this manner. Larger pictures and artwork should be wrapped with brown paper or bubble wrap. Label pictures on face at upper right corner of wrapping. If wrapping materials are not available, you may place a label on the item and the move vendor will wrap and move the item.



5. Computers



Please disconnect and label your computer. You are responsible for disconnecting, packing and labeling your desktop computer, equipment and printers. The CPU and monitor(s) should each have a label. The keyboard, mouse, cables and other peripheral items should be placed in a plastic bag provided by the move vendor.

Laptop computers, PDAs and cell phones should be taken home during your move weekend. Do apply move labels to your docking station and pack all other items as described above.

6. Phones

Your current phones will not move; please leave in place.

7. Packing crates



The crates will be delivered with four-wheeled dollies and can be packed up to four crates per dolly, which we encourage to maximize the efficiency of the move. Crates should be packed in the following sequence:

1. Place the dolly on the floor.
2. Place the first empty crate on the dolly and pack.
3. Place the second empty crate on the first crate and pack.
4. Place the third empty crate on the second crate as needed.

Please fill all crates to the top but do not over-pack. Tops must close completely and lay flat. After you have unpacked, please stack your empty crates by opening the lids and nesting them one inside the other on the dolly and take them to the designated drop area in the new building. Items such as records, printer supplies and paper already packed in a “non-standard” box do not need to be repacked.

Part 2: Labeling Instructions

Please use only the moving labels provided by the move vendor. Each person should look for your individual “workspace code” on the plans provided.

1. What is a label?

Everything that moves must be labeled! Color-coded labels will be used to help ensure that items are moved to the correct floor. Please use only the special color-coded moving labels provided with your crates to label your belongings for the move. Label colors are as follows:

If you are:	Your label color is:
First floor	Red
Second floor	Brown
Third floor	Green

FLOOR	ROOM	PIECE
1	Smith 1200-9	2 of 10

Mark the label with your last name and the unique “workspace code” that has been pre-assigned to all workspaces, equipment spaces, file spaces and enclosed rooms. “1200-9” is an example code. “1200” designates the suite you will be located in; “9” designates the room, office or workstation number.

Indicate the number of crates and other miscellaneous items in the “Piece” area, such as “2 of 10.” This will allow the move team and you to quickly ensure that all your items are present after the move. Please make sure your numbering is complete and accurate. Do not include computer labels in your quantity count.

2. Labeling instructions

Label everything that should move; move vendor will only move items with labels.

Crates and boxes—Place labels on either end (not both) and never the top.

Miscellaneous items—Place label on any outside surface except bottom.

Pictures, wall graphics and artwork—If too large to fit into a box, place label on the upper right corner of wrapping.

Computer monitors/CPUs—On the base or casing visible from the front. Do not place a label directly on the screen.

Computer peripherals—Place in larger plastic bag provided and place label on the bag.



Exhibit 1-36: Sample Headquarters Relocation Personnel Checkout Form

Please review this checklist with your department coordinator when complete and place with your contents to be relocated.

Packing and Labeling

- ☐ All crates and materials moving are marked with the appropriate label and location number.
- ☐ Labels that curl or peel easily are reinforced with tape.
- ☐ There is a moving label on miscellaneous items that do not fit in a crate.
- ☐ There are separate labels on your CPU and monitor(s) and a plastic bag containing peripheral items.
- ☐ Labels on crates and materials moving include a quantity count.
- ☐ Crates and boxes are neatly stacked and not in the way of your computer equipment.
- ☐ All crates are placed on dollies with the maximum amount of four to a dolly when possible.
- ☐ No dolly includes crates to more than one location number.

Furniture

- ☐ All drawers, shelves, overheads and work surfaces are completely emptied. (Discard in the trash anything left behind.)
- ☐ Overhead bins in systems furniture are left open to assist in verifying that nothing was left behind.
- ☐ Keys for file cabinets/desks/credenzas/overhead bins are taped inside the furniture.

Technology

- ☐ You have disconnected your computer equipment and packed and labeled all items as directed.
- ☐ Laptops, laptop locks and other personal electronic devices are being taken home.

General

- ☐ This Personnel Checkout Form has been returned to your department coordinator or left on your desk.
- ☐ Packing and labeling has been completed by **5:00 p.m. on Friday, June 20.**

When complete, please sign this form and contact your department coordinator to authorize your checkout. Thanks for your participation in making this move successful. See you at our new office!

Personnel name: _____

New location code: _____

Personnel signature: _____

Move item quantity: _____



Exhibit 1-37: Sample Headquarters Relocation Welcome Packet

Please read the following.

Welcome to your new facility! Your move team has enjoyed preparing the new office for your arrival. We hope your first day of settling in is enjoyable and trouble-free. Following are a few items of special interest.

1. **Welcome center:** The welcome center is located in Conference Room 2W232 behind the second floor reception desk. Move support and the access card concierge can be found in the welcome center.
2. **Move support requests:** If you encounter an issue with your computer hardware, printer, network, telephone, voice mail, a move-related item, furniture, building or environmental item or would like to suggest an improvement, please come to the welcome center and complete a service request sheet.
Complete a service request sheet:
 - a. Service request sheets have been attached and are also located in the welcome center.
 - b. Green sheets are for technology-related issues (computer, network, printer, telephone, voice mail).
 - c. Yellow sheets are for facility-related issues (move, furniture, building, environmental).
 - d. When completed, please bring it directly to the welcome center. A member of the welcome center team will be dispatched to address your service request(s) as quickly as possible.
 - e. This welcome center process will be in effect from 7:00 a.m. until 2:00 p.m. Monday following the move. After 2:00 p.m., please resume normal reporting procedures.
3. **Changes:** Please see a member of the welcome center team before moving or changing an item within the space. The entire project team has worked diligently to create a thoughtful and integrated environment and may have additional suggestions or understand unforeseen impacts of a particular change. Except for very special cases, changes will require a 60-day waiting period.
4. **Cleaning:** All furniture has been cleaned and dusted as a relocation activity. If additional cleaning is needed, please submit a facilities services request via the welcome center.
5. **Computers and printers:** The desktop support team has set up, connected and tested your computer and printer. If you have encountered a problem or have a question, please come to the welcome center.
6. **Phones and voice mail:** Phones have been placed and are connected and operational. The phones and voice mail function exactly the same as before the move.
7. **Access cards:** Access cards will be required for access to all areas after regular business hours. An access card concierge is set up in the welcome center where access cards can be picked up and keys to the old building may be dropped off.
8. **Lost and found:** A lost and found has been established in the welcome center.
9. **Totes and boxes:** Please nest totes (up to 20 per dolly) and collapse all boxes you wish to discard and place them in the designated locations on each floor. Locations are designated on the floor plans located throughout the building and identified with signage. All totes should be unpacked and returned within one week. Return of totes to the moving company within one week will save significant cost. These totes are the property of the movers. All unreturned totes will be charged to the company at a cost of US\$100 each.
10. **Support after Monday:** After 4:00 p.m. Monday, day one in the new facility, please follow normal procedures for requesting technology- and facilities-related support.
11. **Construction awareness:** The new office is complete except for a few punch-list items. The punch list includes touch-ups and refinements to construction and furniture, which will be underway for a few weeks after occupancy. As mentioned before, a 60-day adjustment period will be in effect prior to making any changes to the work environment. After the move, IT associates will be closely monitoring the functioning of all technical systems to react to any necessary technology refinements that arise due to the move.



✳ Topic 3: Situation-Appropriate Media

As we have seen, facility managers have to communicate with a variety of stakeholders. Selecting situation-appropriate media is an important part of stakeholder communication. Why? As the name “situation-appropriate” generally implies, certain media are more suitable under different circumstances. Furthermore, different stakeholders may have specific media preferences and each type of media has distinct advantages and disadvantages.

Situation-appropriate media help to ensure that the media selected:

- Are best suited for how permanent the message is and if people need to be able to access or refer to it periodically.
- Support the level of detail in the message.
- Support the design of the message (text, graphics, color, symbols and the need to link to supporting documents).
- Support the need for privacy and confidentiality.

Stakeholders and media preferences

FM stakeholders have specific needs for information. Any communication medium chosen should reflect why a stakeholder needs the information and accommodate what he or she will do with it. The media selected should be accessible to the audience. They should also be suited to the level of urgency.

Urgency has two aspects: the urgency of the need to communicate the information and the urgency of the information itself. As Cornel Rosario and Mark Sekula succinctly note in *The Facility Manager's Field Guide*, something that is important in facility management may not be important to a stakeholder. Communicating bad news may be just as important as communicating good news.

Rosario and Sekula recommend using face-to-face communication whenever possible and then following up with a written or electronic summary for the record (if necessary).

Media advantages and disadvantages

Different media have different advantages and disadvantages. It is important to use each to their full potential. Some media may work better than others.

An effective communication plan typically uses a mix of different types. Exhibit 1-38 gives an idea of the advantages and disadvantages of some of the most common media included in a FM communication plan. The list is presented in alphabetical order. It is not exhaustive. Simple examples related to move management are included.



Exhibit 1-38: Advantages and Disadvantages of Different Media (continued on next page)

Type	Target Audience	Advantages	Disadvantages
E-mail	- All stakeholders - Listserve (automatic electronic mailing lists) that can target specific stakeholders	- Widespread distribution - Links to other sites can be established - Pages on existing sites can be established	Listserve and Web sites require someone to manage them and provide technical assistance
Example: An e-mail sent to all employees reminding them of an all-employee meeting pertaining to the move			
Face-to-face presentations and meetings	Specific stakeholders	Potential for interaction and participation	- Requires advance scheduling - Time-consuming to set up and conduct
Example: Routine status meetings with department coordinators or individual departments as needed			
Fact sheets and flyers	All stakeholders or targeted stakeholders	- Wide distribution potential - Inexpensive to produce	- No potential for feedback - Limited to specific information for specific topics (e.g., single facts or tips)
Example: Directions to a new location, including a map			
Interactive media (teleconferencing, video-conferencing, virtual meetings, Webinars)	Specific stakeholders	Global reach	- Some hardware and software requirements - May need to be supported with other print materials
Example: A video conference call with the move management team, department heads and department coordinators to share screen shots of floor plans			
Internet broadcasts (podcasts, streaming media, Webcasts)	Specific stakeholders	Global reach	Some hardware and software requirements
Example: A podcast that introduces the features of a new phone system			
Mobile devices and text messages	Specific stakeholders	- Low cost - Popularity	- Requires cell phone numbers - Restricted length of text messages - Best if used in conjunction with other communication efforts
Example: A text message announcing that the welcome desk in a new location is now open			



Exhibit 1-38: Advantages and Disadvantages of Different Media (concluded)

Type	Target Audience	Advantages	Disadvantages
Newsletters	All stakeholders or targeted stakeholders	- Good for reporting on events, progress or achievements - Ability to deliver electronically or in print - Can include/provide links - Reasonable costs	- Requires visual and written literacy - Can be labor-intensive and/or time-consuming to put together
Example: A newsletter that keeps employees updated on a major relocation, including construction progress, planned food service options, rumors/facts, calendar of events, new technology highlights and other information as needed			
Posters	All stakeholders or targeted stakeholders	- Ability to deliver simple messages or slogans - Ability to show visuals and pictures - Reasonable costs	- No potential for feedback unless it is pilot-tested in advance or produced through participatory process (e.g., focus groups) - Requires visual and written literacy
Example: Pictures of new construction groundbreaking and architectural renderings of planned space			
Social media	All stakeholders or targeted stakeholders	Global reach	Need to understand which channels to focus on
Example: A social media campaign designed to generate buzz about restaurants and other services available in a new location			
Town hall meetings	Specific stakeholders	- Global reach - Can hold an audience's attention better than other forms of communication - Can build trust and credibility for the presenter and the topic - Allows the audience to ask questions and express their opinions	- Can be time-consuming to organize and expensive to do - Requires careful venue selection - Distrust may result if meetings are not conducted in a manner that the audience sees as respectful, believable and honest - Can lead to cynicism if promises to follow up or take action are not kept
Example: A town hall meeting where executives address the state of organizational affairs and the growth need for new construction, including a moderated question-and-answer session			
Web sites/ Internet/blogs/ Instant messages (IMs)	- All stakeholders - Listserve that can target specific stakeholders	- Widespread distribution - Links to other sites can be established - Pages on existing sites can be established - Potential for interaction with blogs and IM	Listserve and Web sites require someone to manage them and provide technical assistance
Example: Pages on a Web site devoted to relocation updates			



Just as communication plans vary, so do the media applications. The relocation of one employee, for example, could be effectively communicated by e-mail and/or telephone; the relocation of an entire headquarters is much more complex and would require a formal communication plan and likely use all methods of communication.

A communication plan serves as a guiding map for all internal and external communication. Stakeholder expectations and other situation specifics will determine the communication issues that need to be addressed and what methods of communication to use.



Progress Check Questions

Directions: Read each question and respond in the space provided. Answers and page references follow the questions.

1. Why is it important to identify and profile stakeholders you intend to target in a communication plan?

2. True or false? Situation-appropriate media implies that the media used are accessible to stakeholders.

() a. True

() b. False



Progress check answers

1. Specific answers may vary. Taking time to look closely at stakeholders helps in choosing the most effective way to communicate with the audience. (p. 1-125)
2. a (p. 1-133)

Next Steps

You have completed this competency of the IFMA Facility Management Learning System. Next, check your understanding by completing the online competency-specific chapter quizzes and case study to help you identify any concepts that need additional study. Check your understanding another way by selecting the competency-specific eFlashcards, or visit the Resource Center to download printable flashcards.

Once you have completed the chapter quizzes, reviewed the eFlashcards, completed the case study and feel confident that you have mastered the information, you can advance to the next competency.

