Written Communication

Best Practices

@juliettehanphd

AGENDA

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WHY THIS MATTERS

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01 Enhance effectiveness at your job--Help you achieve your business outcomes and translate your technical expertise to action

02 Personal professional branding--Match others' perception of you to your capabilities and skillsets

03 Influencing audience beyond those in the room--Your acumen, opinions, thoughts beyond your work product

WRITE *FOR* THE AUDIENCE

Who   Context, level, involvement

What   What do they care about?

Why   Why do they need this message?

Where   Where is their baseline?

How   How will they be impacted by this message?

When   is there a relevant situation around timing?

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Making your message land

✅ **What IS the message:**
Say it out loud and jargon free!

✅ **What outcome and action do you seek:**
Brainstorm? Make decisions? Inform?

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✅ **What narrative approach will land:**
Top-down or Bottom-up narration?
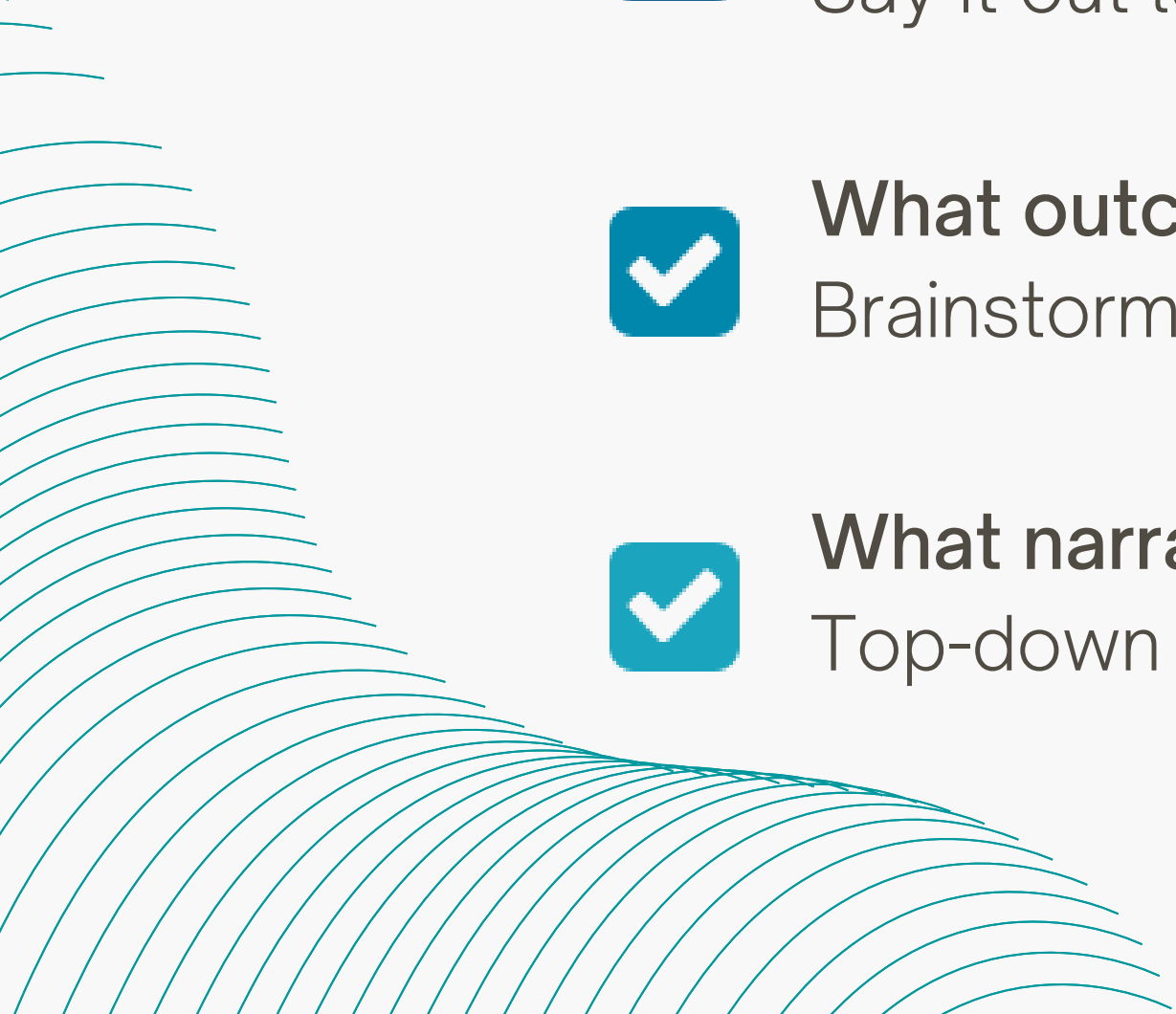
FORMAT

Email / quick note
Progress update, moving the ball forward,
easy alignment (how personal?)

Presentation
Brainstorming, New Concepts, Project
introduction, Broad research

Memo
Story telling is primary; deliver decisions;
mass dissemination

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maybe just call?

WHAT IS A MEMO?

Memos, or Executive Memos, are short-form documents that narrates and informs, in an easy-to-navigate format.

Great memos are brief and informative, and gets the audience "on the same page."

Memos serve a broad range of function depending on purpose and audience, e.g., policy announcement, Board of Director summary, informing business decisions.

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MEMORANDUM

To: Board of Directors

From: Executive Director, Association for a Better Community, Inc.

Date: June 15, 2013

Re: Summary of Financial Results as of May 31, 2013

The purpose of this memo is to summarize the financial results of Association for a Better Community (ABC) as of May 31, 2013. Please find a copy of the following reports in this Board Package:

1. Budget-to-Actual Variance Report for the period ended May 31, 2013: Organization-Wide and by Program, including Year-End Forecast

2. Statement of Financial Position as of May 31, 2013

3. FY 2013 Monthly Cash Flow Projection

1. Budget-to-Actual Variance Reports

While ABC expected to generate a surplus of $36,010 by the end of the period, the organization reports a deficit of ($98,787).

Year-to-date Revenues:

The total revenue budgeted for this period is $2,702,835, while actual revenue earned is $2,497,365. This ($205,470) variance in earned revenue is primarily attributable to the following:

- Foundation Contributions: Year-to-date Foundation contributions total $490,390, which is $92,344 short of budget. This variance is partly due to a change in funding from Foundation XYZ. At the end of FY 12, ABC applied for a $200,000 grant from Foundation XYZ. However, Foundation XYZ indicated through a letter of commitment dated August, 30, 2012 that only $125,000 would be provided in program funding.

- Government Grants & Contracts: Approximately $1,520,677 of contract revenue was expected to be earned by May 31, 2013. However, revenue from government sources has fallen short by $95,655 year-to-date. This is due to an unanticipated mid-year reduction in the contract amount for ABC's after school program. Revenue constraints at the state level have led to similar reductions for all youth serving programs in the city.

- Special Events: Due to inclement weather conditions, ABC's summer picnic took place indoors at the City Arena instead of outside at the City Park. Attendance did not reach predicted levels, and ABC's summer picnic fell short of its revenue goal by $35,754.

Year-to-date Expenses:

Year-to-date expenses total $2,596,152, approximately 3% less than budgeted, or a positive variance of approximately $70,672. Significant variances of specific line item expenses include:

- Personnel: Salary expenses of $1,312,280 are $41,575 short of budget, as the Director of Youth Programs resigned in December of 2012 and a replacement has not yet been hired.

- Professional Services: Professional service expenses are $24,799 below budget for the year-to-date

WHAT MAKES THIS GOOD?

- succint writing: avoid jargon, humor, pretentiousness, long phrasing
- exec summary upfront if the content is long
- creates narrative for longer appendix
- gets to the point right away
- formatted with heading, alignment to break up structure and ease of read
- specific subject line
- tells the reader what they should know (without burying them in data)

TCI Fund Management Limited

Sundar Pichai
Chief Executive Officer
Alphabet
Mountain View, CA 94043

Cc: Board of Directors

15th November 2022

Dear Sundar,

TCI has been a significant shareholder of Alphabet since 2017. We currently own shares valued at more than $6 billion, reflecting our strong conviction in Alphabet's future.

We are writing to express our view that the cost base of Alphabet is too high and that management needs to take aggressive action. The company has too many employees and the cost per employee is too high. Management should publicly disclose an EBIT margin target, substantially reduce losses in Other Bets and increase share buybacks.

Google's Search business has high operating leverage and is not labour intensive. Despite strong revenue growth, operating leverage has been minimal over the last five years. In Q3 2022, total expenses grew 18% year-over-year while revenues grew only 6%. The EBIT margin of the Google Services segment contracted from 39% in 2021 to 32% in Q3 as a result.

During a period of high growth between 2017 and 2021, revenues increased at an annual rate of 23%, cost discipline was not a priority. However, cost discipline is now required as revenue growth is slowing. Cost growth above revenue growth is a sign of poor financial discipline.

Headcount is too high

Our conversations with former executives of Alphabet suggest that the business could be operated more effectively with significantly fewer employees. We agree with Altimeter Capital's Brad Gerstner, who wrote: "It is a poorly kept secret in Silicon Valley that companies ranging from Google to Meta to Twitter to Uber could achieve similar levels of revenue with far fewer people."

You have publicly stated that Google should be 20% more efficient. We could not agree more. Nearly all technology companies are reducing costs. Meta reduced headcount by 13% last week. Amazon is reducing headcount by 10,000. Microsoft, Salesforce, Stripe and Twitter are also reducing headcount.

Alphabet's headcount has increased at an annual rate of 20% since 2017. It has more than doubled since 2017. This growth is excessive, both in relation to historic headcount growth and what the business requires.

Number of Full-Time Employees
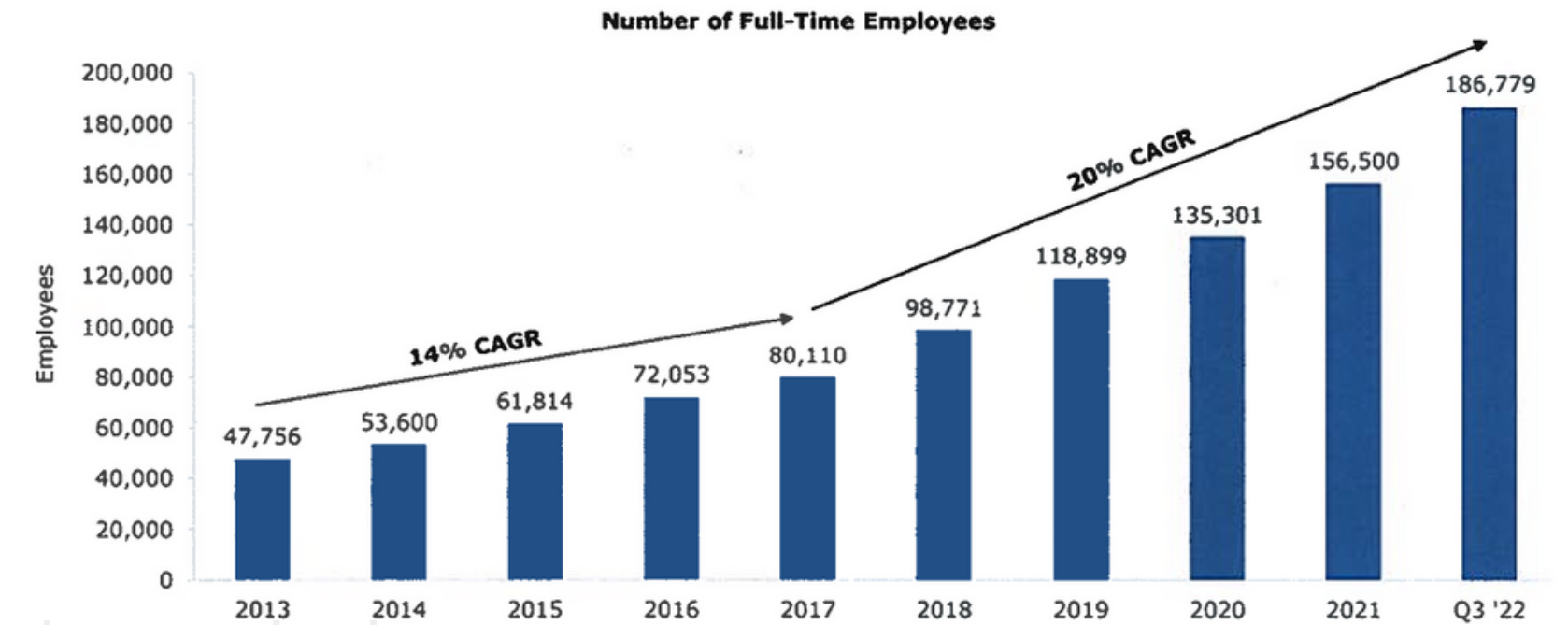
- got to the point
- simply written
- points are clear

how to get better

Read many of them: activist letters, newspapers, etc.

Practice writing them and reading them out loud

Approach templates very sparingly: Know what you want to say first

INSPIRATION

> I DIDN'T HAVE TIME TO WRITE A SHORT LETTER SO I WROTE A LONG ONE INSTEAD

MARK TWAIN

121

AVERAGE NUMBER OF EMAILS AN OFFICE WORKER RECEIVES IN A WORKDAY

86%

PREFER EMAILS OVER OTHER METHODS OF COMMUNICATION AT WORK

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What do you think of this email?

Budget

Hi Jennifer,

I worked hard on calculating the budget and a lot of people were running late but I did finish the budget. (I told you they are slow! 😅) I got it from all the departments that we talked about and the budgets are not looking great. We did look at quite a few of cost categories so I am not sure what more there is; let me know what you think we should do to meet the deadline.

Tired,
Pierre

Elements of compelling emails

UPDATE: 2023 Budget revision outcome

Hi Jennifer,

I have budget updates we discussed last week to get them 10% below current targets.

I have connected with HR, Marketing, Legal, and Sales since, and incorporated their ideas on the following categories:

- Organizational plan
- Vendor contract pause
- Purchasing plans

The analysis (attached) shows we are still only 5% below, and to get to our targets I believe we need to introduce a more holistic reduction strategy across the firm by elevating the conversation to the operating team.

Let me know if you would like to discuss further— otherwise I will go ahead and pull the meeting with the leadership **before the end of the month.**

Best,
Pierre

01 Clear, short subject line

02 Provide context or reminder (standalone content)

03 Use bullets and short phrasing

04 **Synthesis** and next steps with deadline and implication

05 Attach long form separately

06 Mind your tone and humor

de-bottleneck
your workflow!

Anatomy of a Presentation
(CHOOSE YOUR OWN ADVENTURE)

- Cover page
- Agenda / Objective
- Executive Summary **<< Write this first**
- Problem statement **<< What is in and out**
- Methodology
- Analysis
- The Answer
- Implications
- Next steps
- Appendix

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Methodology Slide

We interviewed students, tutors, and proctors while also integrating input from various Company and external sources

8

Interviews: Students and tutors from the across the country

We interviewed >5 Exam advocates, students, and tutors to understand the journey and pain points, including:
- John Doe
- Jane Michael
- Mark Park

Interviews: KOLs

- **Interviews with 5 Learning specialists tutoring 50-200 seniors**
  -From leading institutions such as Weill Cornell, Massachusetts General Hospital, University of Florida, Columbia University, and UCLA

- Thorough teacher **surveys of 5 learning disorder specialists and 11 general tutors**
  -Experience with teaching 10+ years
  -Learning specialists

Company and Consultant resources

- Built on **existing Company's market research team's pathway work**
- **Examined output from prior Company collaborations** (e.g., ABC)
- Leveraged **scientific research and market reports**
- Worked with **Consultant experts and resources**

Student blogs and Foundations

WHY?

Show thoroughness and rigor of your work

Let audience know their perspectives have been included

Add credibility of sources to your work

How to show complex data or concepts

One thought at a time!

How to show complex data or concepts

Using random forest modeling to select vacation spot

1. Obtain input from colleagues

2. Colleague 1: Selects a few criteria out of 100 they deem to be important and recommend location A

3. Colleague 2: Selects other criteria out of 100 they deem to be important and recommend location B

4. Repeat (10,000 Colleagues)

5. Final recommendation is the on with most votes

1. Start with the narrative in simplest form

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How to show complex data or concepts

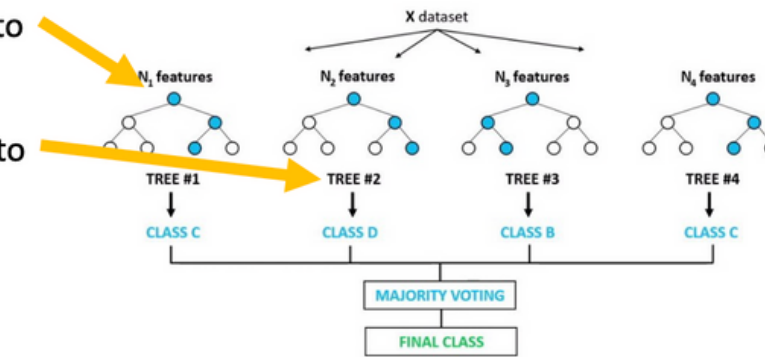Using random forest modeling to select vacation spot

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Using random forest modeling to select vacation spot

Random Forest Classifier

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1. Start with the narrative in simplest form

2. Show complicated stuff last, drawing attention to only the pertinent parts

How to show complex data or concepts

Using random forest modeling to select vacation spot

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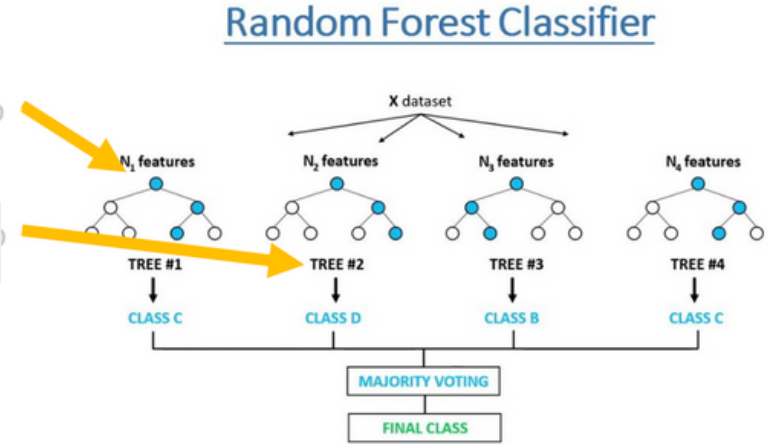4. Repeat (10,000 Colleagu
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Feature A = Does not Restrict training data set

Random Forest Classifier

X dataset

N₁ features | N₂ features | N₃ features | N₄ features

TREE #1 | TREE #2 | TREE #3 | TREE #4

CLASS C | CLASS D | CLASS B | CLASS C

MAJORITY VOTING

FINAL CLASS

1. Start with the narrative in simplest form

2. Show complicated stuff last, drawing attention to only the pertinent parts

3. Minimize visual changes between narratives

Great presentations...

Reduce burden on audience

Limit information to "must know"

Narrative-forward

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Format is as required by content

Clear thesis

Making the message land

- Pre-align with the audience

- Send out the pre-read

- Minimalize work for audience

- Be mindful of length and density of material

- Mind the culture

YOU MUST QUALITY CHECK: BREAK CONTEXT CUES

You might not realize it, but your brain is a code-cracking machine.

For emaxlpe, it deson't mttaer in waht oredr the ltteers in a wrod aepapr, the olny iprmoatnt tihng is taht the frist and lsat ltteer are in the rghit pcale. The rset can be a toatl mses and you can sitll raed it wouthit pobelrm.

S1M1L4RLY, Y0UR M1ND 15 R34D1NG 7H15 4U70M471C4LLY W17H0U7 3V3N 7H1NK1NG 4B0U7 17.

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Step 1
Break context by reading backwards

Step 2
Pick on feature at a time: spelling, data checking, etc.

Step 3
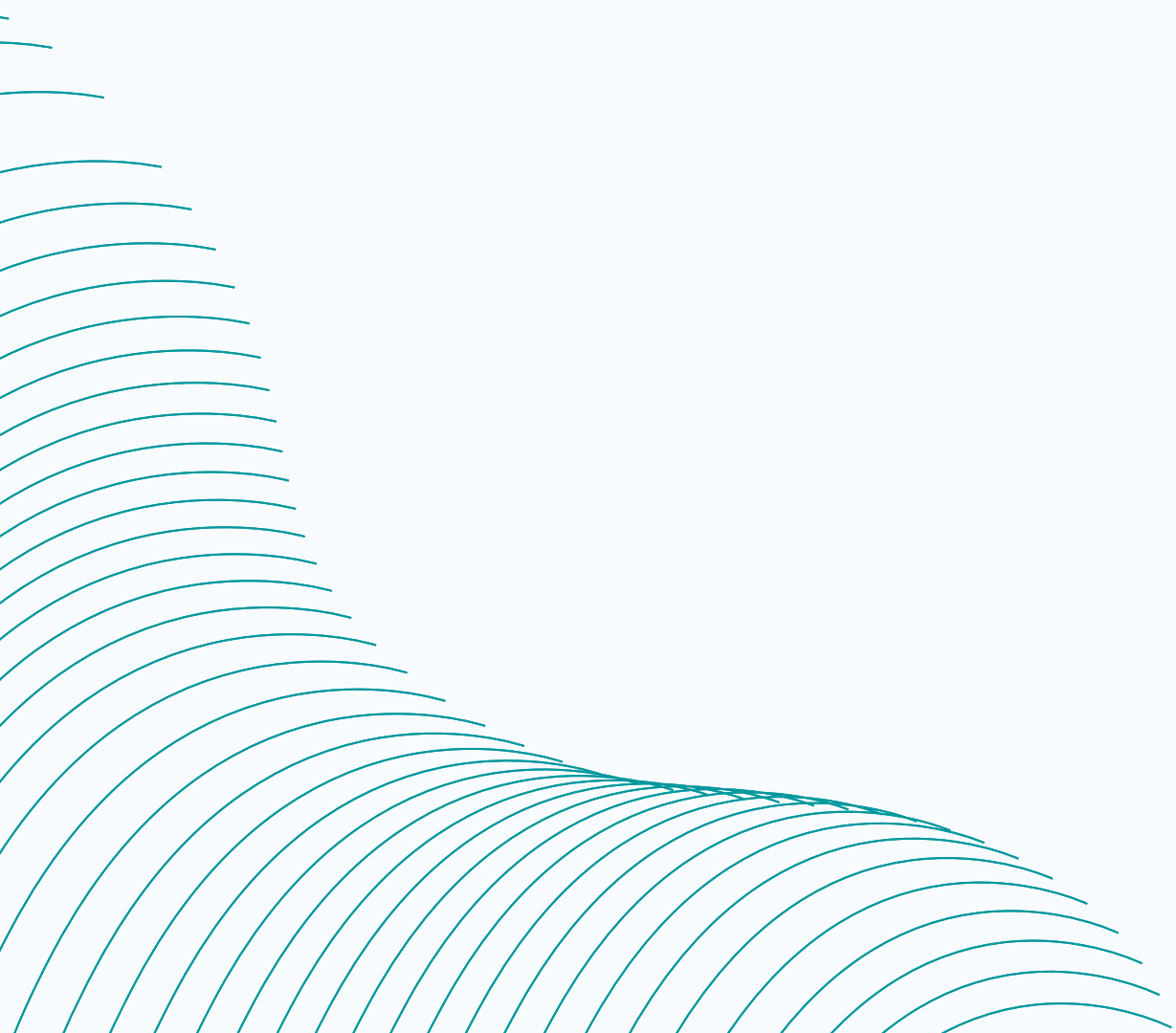Read out loud and ask someone else to check your work

BEFORE YOU LEAVE THE HOUSE, TAKE A LOOK IN THE MIRROR AND TAKE ONE THING OFF

COCO CHANEL

Thank You!

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