

# 2



## PLANNING AND ORGANIZING CONTENT

Planning is a vital part of work in all professions. Airplane pilots file a flight plan before they fly. Architects create blueprints before a building is constructed. Coaches develop a game plan for their teams before they play. Working without a plan invites disorganization and chaos.

Planning is also one of the most important aspects of writing and speaking. Just as a coach develops a unique game plan for each opponent, you should develop a writing or speaking plan for each of your messages.

In this chapter you'll learn two major skills:

- How to use the PACS planning model.
- How to create and organize the content of your messages.



**Figure 2.1** *Creating plans is important in all professions.*

## PLAN THE WRITING

As you prepare to write an email, report, proposal, or any other type of message, remember four basic planning steps. First, determine the purpose of your message. Second, analyze the audience. Third, analyze the context in which your communication will occur. Fourth, develop a strategy. Remember this four-step planning process with the acronym PACS (Purpose, Audience, Context, and Strategy).

### DETERMINE THE PURPOSE

Business messages usually are written for one or more of three major purposes: (1) to inform or instruct, (2) to persuade or convince, or (3) to build or maintain trusting relationships. For instance, if you send a note cancelling a luncheon appointment, your main purpose is to inform. However, you wonder if your message might damage your relationship of trust, so you decide to include something to strengthen the relationship, such as, “May we reschedule for next Thursday? I’ll buy!” Table 2.1 provides more information about these purposes.

**Table 2.1** Three Major Purposes of Business Messages

Purposes	Questions	How to Achieve Purposes
Inform/instruct	What do I want the audience to <i>know</i> ?	Provide appropriate information that the audience understands.
Persuade/convince	What do I want the audience to <i>do</i> ?	Provide convincing information that prompts the audience to do what I want them to do.
Build/maintain relationships	How do I want the audience to <i>feel</i> ?	Be genuine and honest and communicate in such a way that the audience trusts me.

### ANALYZE THE AUDIENCE

Once you identify your communication purposes, analyze your audience (the people who will receive your message) so you can tailor your message for them. Often your messages will have multiple audiences, such as the following:

- **Primary audience.** Your main intended audience, the “To” people in an email.
- **Secondary audience.** Your secondary intended audiences, such as people you CC or BCC by email.
- **Tertiary audience.** Your unintended audience, such as people who receive the information without your knowledge; the information may be forwarded by primary- or secondary-audience members.

Consider this example. Scott Bellini is the branch manager of a regional accounting firm and shares many of the messages he receives. Scott is trying to develop an online

## ANALYZE THE CONTEXT

As you plan your message, consider what is going on in the context surrounding your communication. An ongoing challenge is that contexts are complex and dynamic—they are always changing. For example, when you plan to email a customer or client, you consider all the past emails, face-to-face conversations, meetings, and phone calls with that person, but you also realize that subsequent emails, reports, conversations, and meetings will occur. Today you might send an email acknowledging the customer's purchase order; tomorrow you might send a text message indicating that the product has been shipped; and next week you might have to respond to the customer's complaint that part of the shipment was missing.

Because you can't discern every contextual factor, consider the most relevant ones influencing you and influencing your audience, including both external and internal factors.

**YOUR OWN CONTEXT.** Think about what external factors are affecting your own organization—your competitors, financial pressures, local government restrictions, expectations of customers and clients, and so forth. Analyze what is going on inside your organization, such as expectations of owners and managers. Think about what is prompting you to communicate with the person at this time and the importance and urgency of the situation. Consider your past relationship with the person or audience, such as how long you have known the person and the quality of the relationship. Consider also what you want your association to be like in the future.

**YOUR AUDIENCE'S CONTEXT.** Consider what is happening in the external context of the audience—the general economy, political and societal influences, and general industry trends and issues. Think about the organization—its mission, size, products and services, customers, strengths and weaknesses, and challenges and goals. Consider any unexpected and unpredictable events that have emerged for your audience, such as technological change, weather-related catastrophes, or sudden shifts in organizational priorities. Identify any physical, organizational, technological, or other barriers that might interfere or compete with your message.

Based on the foregoing audience and context analyses (see Figure 2.4), identify all the contextual elements that might work for and against your communication. Then determine how to capitalize on the positive forces and eliminate or minimize the barriers.



**Figure 2.4** Audience and context analyses are critical to communication.

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*I'm happy to report that our new office building will be completed one month earlier than planned. The final inspection is scheduled for July 27, and we plan to begin our move on August 1. We will announce more details about the move in the coming weeks.*

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However, if the main message is that your financial services firm is going to eliminate an employee benefit, the message could first discuss the company's weakening financial situation and then explain that the company is being forced to cut back on expenses. This background information prepares the reader's mind for the subsequent bad-news message.

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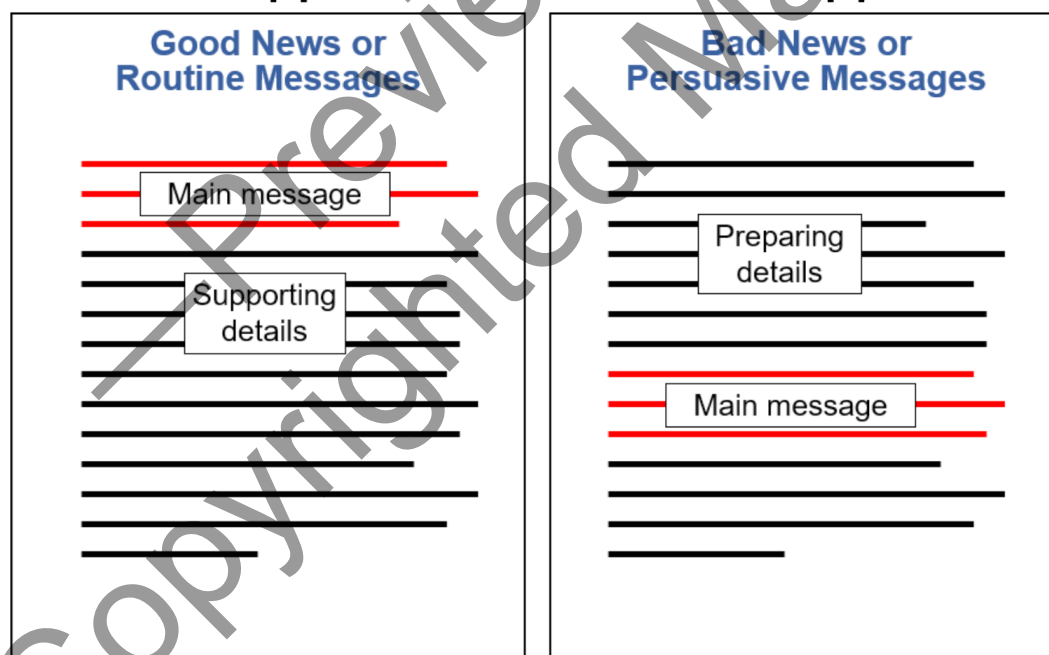
*The current economic downturn has taken a toll on our company's financial condition. Since the third quarter of last year, our total revenues have fallen by 18 percent. Because of this financial stress, it is necessary for us to discontinue our Educational Assistance Program on February 1.*

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Of course, these two examples are brief. In most professional contexts, you would need to include more information to achieve all the objectives of the message.

## Direct Approach

## Indirect Approach



**Figure 2.7** Different messages call for different psychological approaches.

**Logical and Emotional Appeals.** Your messages can appeal to both the logical and emotional domains of your audience (see Figure 2.8). The philosopher Aristotle identified three persuasion strategies—logos, pathos, and ethos.

*Logos* refers to an appeal to the mind, using logical reasoning. Always make sure your message is reasonable, logical, and clear. Informational messages must include appropriate explanations, examples, analyses, comparisons, and details. Persuasive messages

### Bottom-up Outlining in Action

Jenny Baxter, a software developer, has just attended a public hearing in her community. The public hearing did not go well for city council members who tried unsuccessfully to persuade the citizens to accept their proposal for dealing with a troublesome issue. As Jenny leaves the public hearing, she is frustrated with the city council and wonders why they didn't get input from the citizens earlier.

Then a thought comes to her mind—why couldn't the city use technology to deal with this problem! When she arrives home, she creates a free list on her computer, quickly typing her thoughts as they come into her mind. She doesn't worry about sequencing the thoughts at this time—she can do that later.

Once the free list is created, Jenny knows that she must organize all the thoughts into categories. After a few minutes of analysis, she decides to place them into four categories: solution, problem, implementation, and benefits.

At this point, the list is looking more organized, but Jenny knows the current sequence of ideas doesn't seem logical. But what would be the best order? To make this decision, Jenny needs to have a specific purpose, and she decides that she will write a proposal to persuade the city council to organize a 25-member citizen advisory council (CAC). Using an online discussion board, the CAC would give input whenever the council begins discussing new ideas or solutions to city problems. This feedback would improve the quality of the city council's decisions and achieve greater acceptance by citizens.

Knowing that her purpose is to persuade, Jenny decides to organize her material in a problem-solution order. Therefore, she first sequences the overall categories and then sequences the free-list items within each category. With the information in this form, Jenny can now begin to write a well-organized and persuasive proposal.

### FREE LIST

Technology could be used for public input  
 People get blindsided at public hearings  
 City gets pushback b/c it doesn't get early input  
 25 citizens appointed appointment by mayor  
 Name: Citizen Advisory Council  
 Would get citizens involved early  
 Better decisions  
 Better buy in and less resistance  
 City IT group distributes emails, analyzes feedback  
 Need approval from city council to make it happen  
 City identifies a problem or proposal it is working on  
 Sends out request for feedback from CAC  
 City acts on CAC counsel

### CATEGORIES

Solution  
 Technology could be used for public input  
 25 citizens appointed by mayor  
 Name: Citizen Advisory Council  
 City IT group distributes emails, analyzes feedback  
 City identifies a problem or proposal it is working on  
 Sends out request for feedback from CAC  
 City acts on CAC counsel

Problem  
 City gets pushback b/c it doesn't get early input  
 People get blindsided at public hearings

Implementation  
 Need approval from city council to make it happen

Benefits  
 Would get citizens involved early  
 Better decisions  
 Better buy in and less resistance

### SEQUENCE

Problem  
 City gets pushback b/c it doesn't get early input  
 People get blindsided at public hearings

Solution  
 Technology could be used for public input  
 Name: Citizen Advisory Council  
 25 citizens appointed by mayor  
 City identifies a problem or proposal it is working on  
 Sends out request for feedback from CAC  
 City IT group distributes emails, analyzes feedback  
 City acts on CAC counsel

Benefits  
 Would get citizens involved early  
 Better decisions  
 Better buy in and less resistance

Implementation  
 Need approval from city council to make it happen

**Figure 2.12** The narrative on the left tells about the creation, categorization, and sequencing outlines on the right.