

# Learning Module (Workshop)

Venue

Duration - Date



## Getting the Message Across



### Workbook

NAME: .....

ORGANISATION: .....

**This Workbook is Personal & Confidential to the Programme Participant.**  
It has been designed in modular fashion to accommodate Pre-Workshop Activity, materials provided in the Workshop and also to facilitate optional Post-Workshop further learning and development. The Work-Book content will be delivered in sections/segments.

**WE HAVE PROVIDED A PERSONAL ASSESSMENT FROM PAGE 44, FOLLOWED BY BLANK PAGES FOR ANY NOTES**



Health Development Consulting



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## WORKBOOK: GETTING THE MESSAGE ACROSS

In this Workshop, part of a series of five for Information and Intelligence personnel, participants are encouraged to explore and better understand the worlds of marketing, promotion and communication, with a particular focus on self and team development via a series of practical healthcare/public health relevant scenarios and situations.

Whilst, as required, workshops will be provide insights into some of the basic and underpinning theories of marketing and communication, our accent throughout will be on inter-activity via individual and team practical exercises allied to encouragement for participants to develop their knowledge and understanding further, using the Workshop as a springboard for further development.

Use of a Learning Log provided to all those who attend Workshops in this series is intended to support this 'continuous learning' approach; additional Learning Log pages are included at the end of this Workbook.

**Linked website:** [www.healthknowledge.org.uk](http://www.healthknowledge.org.uk)

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Workbook Contents

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## **Getting The Message Across**

**An Introductory Interactive  
Learning Module**

**Pre-Course Work**

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Instructions

1. Please read through the Focus of the Module, Outline Programme, and Objectives.
2. Please identify up to three personal objectives for attending this Module and agree them with your manager.
3. Please complete the Influencing Style Questionnaire and bring it with you to the Module for analysis.
4. Please read the article on Health Promotion.

## **Focus Of The Module**

This Module covers the communications related aspects of the Programme being implemented. Whilst its primary focus is on the communication and promotion of schemes designed to encourage improved awareness and action on public health, especially through Stakeholders and in the Communities, it also includes a focus on internal and inter-organisational communication – keeping people informed about, and aligned with, the strategies and new work practices being implemented.

## **Module Contents**

### **Outline Programme**

#### **10.00**

- Introduction and Objectives
- Participants' Objectives
- The different Communication Roles of:
  - Publicity
  - Promotion
  - Public Relations
  - Corporate Communications
- The role and objectives of Marketing
- Creating a Communications Strategy
  - The process and skills
- Mapping Stakeholders and their likely response to communications
- Different Influencing Styles and their uses
- Key messages to get across in Health Promotion
- How to put your message across effectively
- Preparing yourself for presentations
- Structuring presentations
- Handling Questions and Objections
- Review of Objectives
- Evaluation of the Module

#### **16.00**

Summary and Close



## Module Objectives

*As a result of attending this Module participants will be able to:*

- Understand effective communication and associated promotional (marketing) aspects in the context of the Public Health Information & Intelligence environments.
- Know how to present material, policies, and ideas using styles and techniques appropriate for a range of audiences.
- Understand the effects that the media has on public perception, investment and decision making processes.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Your Personal Objectives

As a result of this module I want to be able to:

1.

2.

3.

*Please agree these objectives with you manager.*

## **Influencing Style Questionnaire**

Complete the questionnaire to discover your preferences when it comes to influencing others.

You are asked to consider yourself, reflect on each of the items below and select a score which best represents how you generally behave in relation to others. Use the following scoring to allocate points:

- 0** I never do this.
- 1** I rarely do this.
- 2** I sometimes do this.
- 3** I often do this.
- 4** I always do this.

1.	Openly share my principles and beliefs with others.	
2.	Communicate my goals and objectives clearly to others.	
3.	Like to find out the help and support others need.	
4.	Create a picture of how the future could be which excites others.	
5.	Employ the use of rational and logical arguments to persuade others.	
6.	Get irate and emotional to get my way.	
7.	Persuade others using my authority and status.	
8.	Like to educate people so that they re-evaluate the world around them.	
9.	Energise others by encouraging and supporting their ideas.	

## WORKBOOK: GETTING THE MESSAGE ACROSS

10.	Express my values to others with conviction.	
11.	Use clear objectives to channel the efforts of others towards achievement of a goal.	
12.	Coach people to help them solve their problems.	
13.	Paint a vivid picture of a future which attracts people.	
14.	Use data and facts to demonstrate the validity of the argument I am presenting.	
15.	Use pressure to get others to do what I want.	
16.	Employ formal authority and personal power to get things done.	
17.	Challenge others to change the way they see things.	
18.	Empower others by giving them encouragement and support.	
19.	Have a strong sense of what is right and wrong where ethics are concerned.	
20.	Use performance standards and measurable objectives to get others to deliver.	
21.	Assist people to find solutions to problems which bother them.	
22.	Create and communicate a vision of the future in vivid language.	
23.	Make sure that my proposals are based on proven data and facts.	
24.	Use personal will power to get others to do what I want.	

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25.	Rely on my authority and position to get results.	
26.	Provide guidance to others to help them improve their performance.	
27.	Encourage and support others when they are struggling.	
28.	Make decisions based on deeply held principles and beliefs.	
29.	Manage people's performance closely to ensure they deliver required results.	
30.	Provide practical help and support to others to help them solve their problems.	
31.	Use images of what the future could be to excite people's imagination.	
32.	Influence others by presenting logical and sound arguments.	
33.	Get others to perform by making a fuss.	
34.	Ensure people understand my power and authority when requesting them to do something.	
35.	Easily get people to open their minds to new ideas.	
36.	Build confidence in others by giving them support and encouragement.	

Thank you for completing the Influencing Style Questionnaire. Now please collate the scores you've given to yourself on the next page.

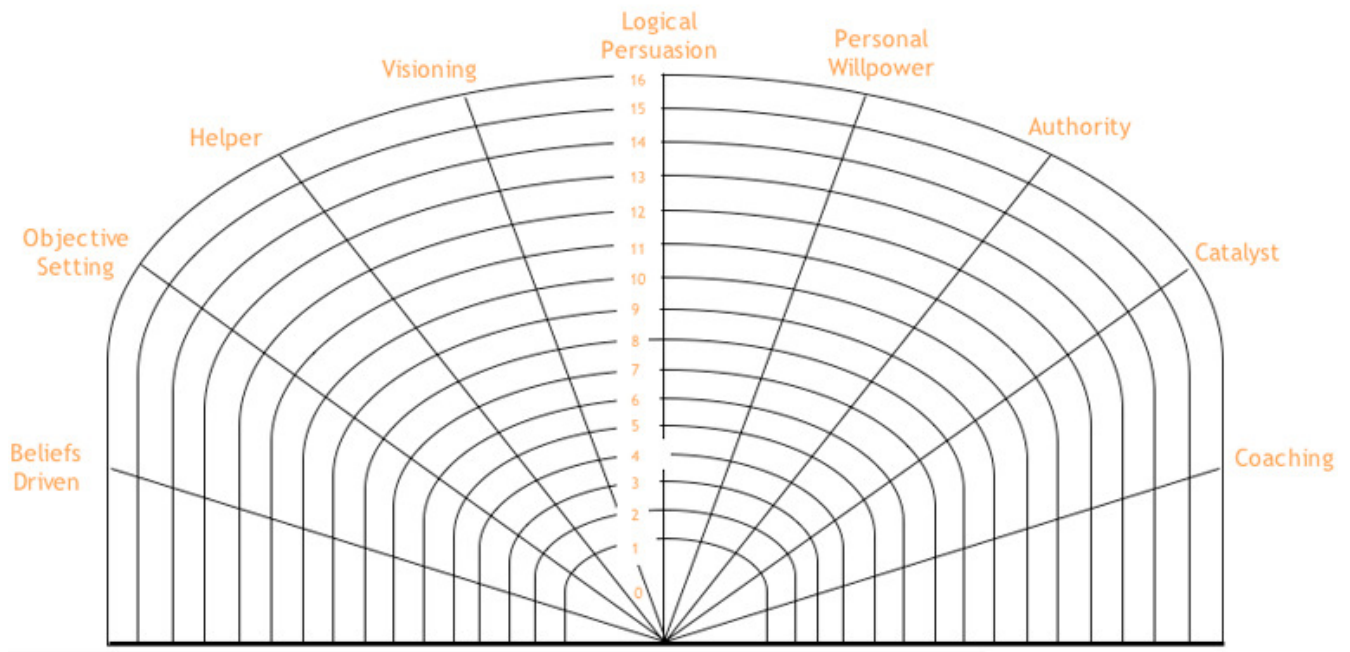
## Influencing Style Questionnaire

### Answer Grid

Take the scores from the questionnaire and enter them on the answer grid below. Then calculate the totals for each horizontal line and write these in the boxes provided.

1	_____	10	_____	19	_____	28	_____		I	Beliefs driven style
2	_____	11	_____	20	_____	29	_____		II	Objective-setting style
3	_____	12	_____	21	_____	30	_____		III	Helper style
4	_____	13	_____	22	_____	31	_____		IV	Visioning style
5	_____	14	_____	23	_____	32	_____		V	Logical persuasion style
6	_____	15	_____	24	_____	33	_____		VI	Personal willpower style
7	_____	16	_____	25	_____	34	_____		VII	Authority style
8	_____	17	_____	26	_____	35	_____		VIII	Catalyst style
9	_____	18	_____	27	_____	36	_____		IX	Coaching style

## Influencing Style Profile



Plot your scores on the relevant axis of the above chart and join up your scores to create a graphic illustration of your preferred and less preferred influencing styles.

## Health Promotion

### Definition

Health promotion, as defined by the World Health Organization, is the process of enabling people to increase control over, and to improve, their health. In the USA, health promotion is much more narrowly conceived as "the science and art of helping people change their lifestyle to move toward a state of optimal health." Means of health promotion include health education and social marketing.



## The Basic Principles Of Health Promotion

**According to the Ottawa Charter for Health Promotion the basic principles of health promotion are:**

### Prerequisites for health

- The fundamental conditions and resources for health are peace, shelter, education, food, income, a stable ecosystem, sustainable resources, social justice and equity. Improvement in health requires a secure foundation in these basic prerequisites.

### Advocate

- Good health is a major resource for social, economic and personal development and an important dimension of quality of life. Political, economic, social, cultural, environmental, behavioural and biological factors can all favour health or be harmful to it. Health promotion action aims at making these conditions favourable through advocacy for health.

### Enable

- Health promotion focuses on achieving equity in health. Health promotion action aims at reducing differences in current health status and ensuring equal opportunities and resources to enable all people to achieve their fullest health potential. This includes a secure foundation in a supportive environment, access to information, and opportunities for making healthy choices. People cannot achieve their fullest health potential unless they are able to take control of those things which determine their health. This must apply equally to women and men.

### Mediate

- The prerequisites and prospects for health cannot be ensured by the health sector alone. More importantly, health promotion demands co-ordinated action by all concerned: by governments, by health and other social and economic sectors, by non-governmental and voluntary organizations, by local authorities, by industry and by the media. People in all walks of life are involved as individuals, families and communities. Professional and social groups and health personnel have a major responsibility to mediate between differing interests in society for the pursuit of health.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Mediate (Cont'd)

- Health promotion strategies and programmes should be adapted to the local needs and possibilities of individual countries and regions to take into account differing social, cultural and economic systems.
- Health Promotion Action Means:
  - Build healthy public policy.
  - Health promotion goes beyond health care. It puts health on the agenda of policy-makers in all sectors and at all levels, directing them to be aware of the health consequences of their decisions and to accept their responsibilities for health.
- Health promotion policy combines diverse but complementary approaches including legislation, fiscal measures, taxation and organizational change. It is co-ordinated action that leads to health, income and social policies that foster greater equity. Joint action contributes to ensuring safer and healthier goods and services, healthier public services, and cleaner, more enjoyable environments.
- Health promotion policy requires the identification of obstacles to the adoption of healthy public policies in non-health sectors, and ways of removing them. The aim must be to make the healthier choice the easier choice for policy-makers as well.

### Create supportive environments

- Societies are complex and interrelated. Health cannot be separated from other goals. The inextricable links between people and their environment constitute the basis for a socioecological approach to health. The overall guiding principle for the world, nations, regions and communities alike is the need to encourage reciprocal maintenance - to take care of each other, our communities and our natural environment. The conservation of natural resources throughout the world should be emphasized as a global responsibility.
- Changing patterns of life, work and leisure have a significant impact on health. Work and leisure should be a source of health for people. The way society organizes work should help create a healthy society. Health promotion generates living and working conditions that are safe, stimulating, satisfying and enjoyable.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Create supportive environments (Cont'd)

- Systematic assessment of the health impact of a rapidly changing environment - particularly in areas of technology, work, energy production and urbanization is essential and must be followed by action to ensure positive benefit to the health of the public. The protection of the natural and built environments and the conservation of natural resources must be addressed in any health promotion strategy.

### Strengthen community action

- Health promotion works through concrete and effective ways in setting priorities, making decisions, planning strategies and implementing them to achieve better health. At the heart of this process is the empowerment of communities, their ownership and control of their own endeavours and destinies.
- Community development draws on existing human and material resources in the community to enhance self-help and social support, and to develop flexible systems for strengthening public participation and direction of health matters. This requires full and continuous access to information, learning opportunities for health, as well as funding support.

### Develop personal skills

- Health promotion supports personal and social development through providing information, education for health and enhancing life skills. By so doing, it increases the options available to people to exercise more control over their own health and over their environments, and to make choices conducive to health.
- Enabling people to learn throughout life, to prepare themselves for all of its stages and to cope with chronic illness and injuries is essential. This has to be facilitated in school, home, work and community settings. Action is required through educational, professional, commercial and voluntary bodies, and within the institutions themselves.

### Reorient health services

- The responsibility for health promotion in health services is shared among individuals, community groups, health professionals, health service institutions and governments. They must work together towards a health care system which contributes to the pursuit of health.

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### Reorient health services (Cont'd)

- The role of the health sector must move increasingly in a health promotion direction, beyond its responsibility for providing clinical and curative services. Health services need to embrace an expanded mandate which is sensitive and respects cultural needs. This mandate should support the needs of individuals and communities for a healthier life, and open channels between the health sector and broader social, political, economic and physical environmental components.
- Reorienting health services also requires stronger attention to health research as well as changes in professional education and training. This must lead to a change of attitude and organization of health services, which refocuses on the total needs of the individual as a whole person.

## **Outline Programme**

### **09.30 REGISTRATION & REFRESHMENTS**

#### **10.00**

- Introduction and Participants Objectives
- What is Marketing? Social Marketing?
- Programme Objectives
- The Fine Line
- The different Communication Roles of:
  - Publicity
  - Promotion
  - Public Relations
  - Corporate Communications
- The role and objectives of Marketing

### **1130 REFRESHMENT BREAK**

- Creating a Communications Strategy
  - The process and skills
- Mapping Stakeholders and their likely response to communications

### **13.00 : 13.45 LUNCH**

- Different Influencing Styles and their uses
- Key messages to get across in Health Promotion
- How to put your message across effectively
- Preparing yourself for presentations
- Structuring presentations

### **1500 : REFRESHMENT BREAK**

- Handling Questions and Objections
- Review of Objectives
- Evaluation of the Module

### **16.00SUMMARY, FEED-BACK AND CLOSE**

### Welcome to the 'Getting the Message Across' learning module.

The module links with a Session Workbook that includes (at the end of the book) a Learning Log.

The Module has been designed to be as practical as possible; we provide underpinning theory and models to support the various practicals

***Let's first re-visit the overall Objectives of this Information and Intelligence Programme...***

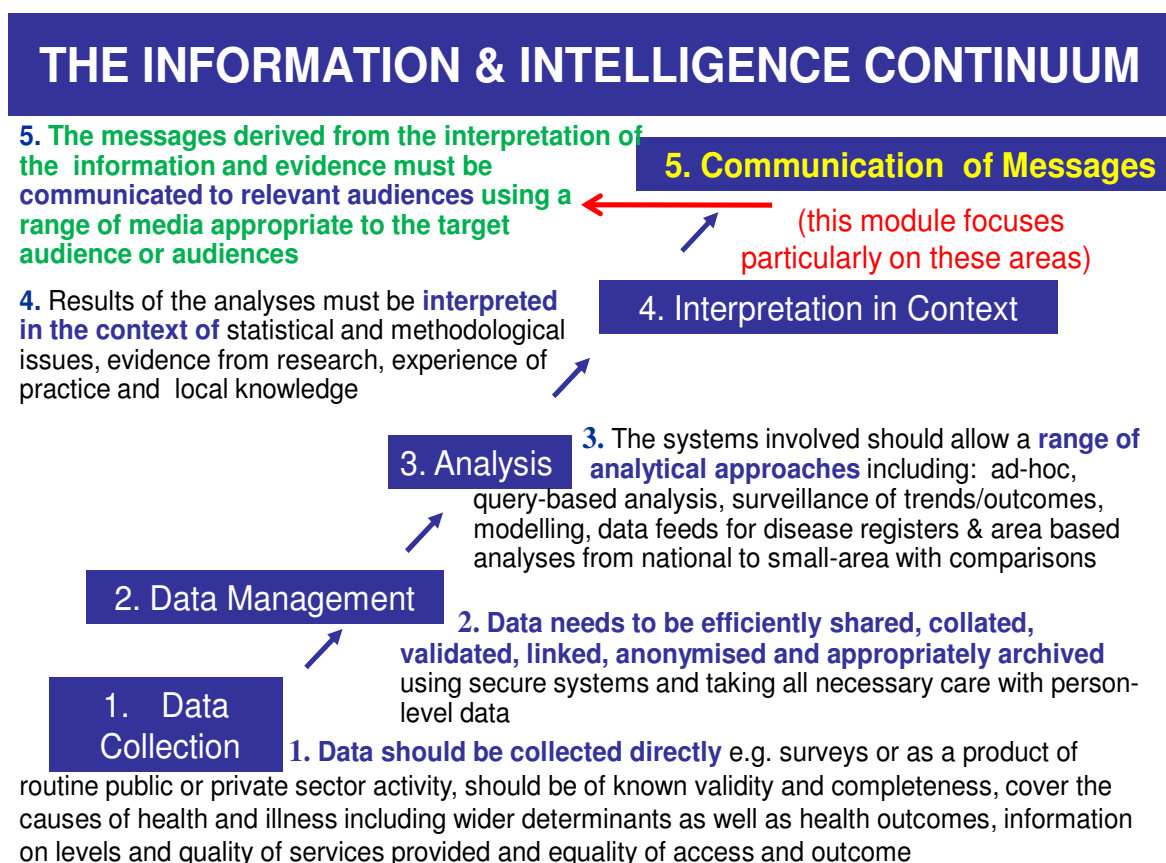
### Programme Objectives

- The Informing Healthy Choices Strategy sets out an approach that will strengthen health information and intelligence resources across England
- This includes supporting and developing the knowledge and skills of the information workforce in the NHS and Local Government organisations.....
- .....increasing capacity & capability of the public health workforce.
- It aligns with the Public Health Skills and Career Framework
- It has been developed in response to *strongly expressed need for a mechanism that facilitates collaboration and coherence across this diverse workforce*, maximises their collective contribution & underpin the influence of public health in the UK...

## Contextualisation of the Programme

The Department of Health offers the opportunity for the Information and Intelligence workforce to undertake Learning via five interactive learning modules that make up the component part of the skills identified to improve population health and wellbeing:

- Leadership and Management
- Collaborative working
- Policy and Strategy Development and implementation
- Getting the Message Across
- Prioritisation and Performance Management



## WORKBOOK: GETTING THE MESSAGE ACROSS

“The purpose of information is to promote understanding and influence behaviour and decisions.”

“Information is therefore an integral part of the culture of the organisation.”

***Bullas and Ariotti, 2002 — Information for Managing Healthcare Resources***

“Forget buildings or machines, the real source of wealth is intelligence, applied intelligence.”

***Charles Handy 1995***

“The revolution that is underway in Information and Knowledge is about to revolutionise education and healthcare”

***Peter Drucker, 1999 — Management Challenges for the 21st Century***

## Getting the Message Across

### Module Objectives

In an interactive learning environment delegates will be able to:

- Understand and use effective communication techniques
- Gain knowledge of how to present material using styles and techniques appropriate for a range of audiences
- Understand the effect that the media has on public perception, investment and decision making



## Introductions and Objectives

### One Minute Introductions

Please come to the workshop ready to tell the group about yourself under the following headings:

Please tell us:

- Who you are
- Your Job Title
- Your location
- Your primary responsibilities
- Your 3 main Objectives in being here today

## Effective Communication underpins

### “Getting the Message Across”

#### Communication Defined:

- The imparting or exchange of information, knowledge, ideas or feelings... by speech, writing, pictures, gestures or other media
- Also: the study of ways in which human beings communicate

*(Oxford/Collins dictionaries)*

The following quotation by NetCare, specialist healthcare communications summarises the importance in health related environments:

*“To communicate properly with the local community there is no alternative to the hard but rewarding work of fully engaging with stakeholders on a sustained basis.”*

<http://ww7.investorrelations.co.uk/netcare/media/news/?ref=19&year=2006>

## Communication forms a major part of modern-day “Marketing”

#### Plenary Practical

- What is marketing?
- What are the Key Features of Marketing?
- What are the primary Objectives of Marketing?

## On Marketing And Communication

### What Is Marketing?

Most people think that marketing is only about the advertising and/or personal selling of goods and services. **Advertising and selling, however, are just two of the many marketing activities.**

In general, marketing activities are all those associated with identifying the particular **wants and needs of a target market of customers**, and then **going about satisfying those customers** better than competitors. This involves doing **market research** on customers, **analyzing their needs**, and then **making strategic decisions** about **product design, pricing, promotion and distribution.**

Here is just one of literally 100s of definitions of Marketing:

*"Marketing is the process of planning and executing the conception, pricing, promotion, and distribution of ideas, goods, services, organizations, and events to create and maintain relationships that will satisfy both individual and organizational objectives."*

**Contemporary Marketing Wired (1998) by Boone and Kurtz. Dryden Press.**

### Marketing: Primary Objectives

The objective of marketing is — through the use of rigorous market and customer research, a defined strategy and supporting plans — to target potential and existing customers/clients, consumers/stakeholders of the organisation (e.g. populations)

and to pro-actively communicate key, persuasive messages to influence them to buy/adopt the organisation's products/services/ideas/concepts/advice and (commercially) versus its competitors

thus contributing towards the long term sustainable goals and objectives of the organisation.

### Marketing Models : The 4Ps : 7Ps

An underpinning marketing fundamental is the design, development and provision of products, services, ideas and concepts **that meet customer/consumer needs**

#### The 4 Ps

- Product
- Price
- Promotion
- Place

#### Another 3 Ps

- People
- Process
- Physical evidence

### The 'Marketing Mix'

It is useful to know and understand one of the fundamental models used in Marketing: Marketers have typically used the well-known '4Ps' approach to marketing:

- Product
- Price
- Promotion
- Place (not really a 'P' because it really means 'distribution channels' or 'routes to market')

More recently a further three Ps have been added

- People
- Process
- Physical evidence

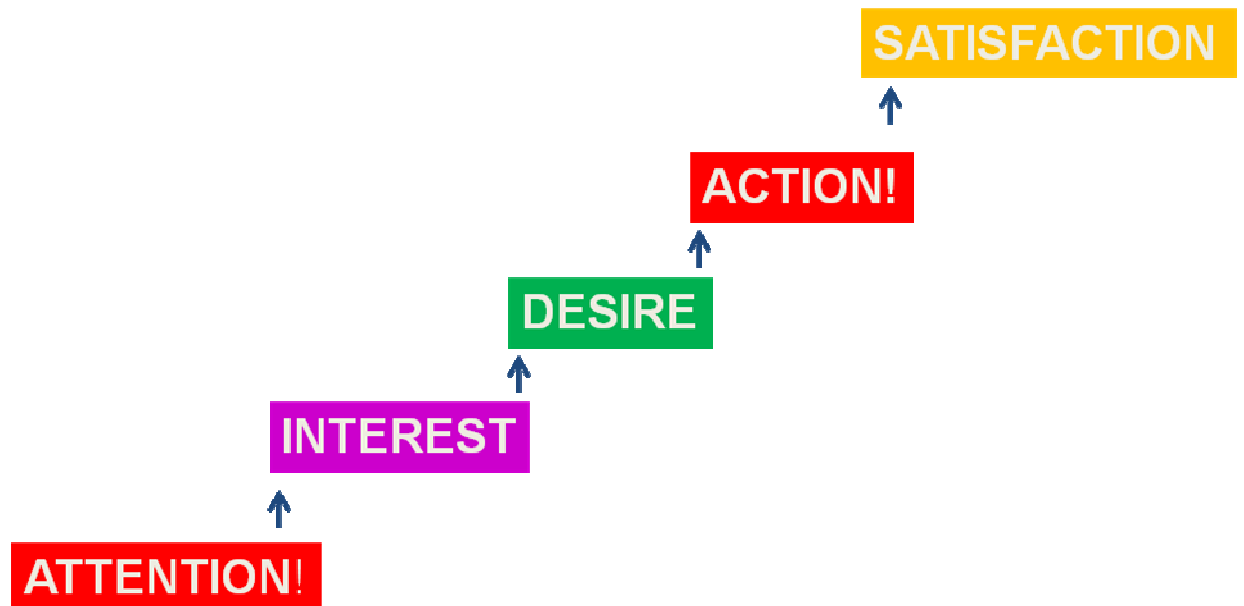
## WORKBOOK: GETTING THE MESSAGE ACROSS

### “AIDAS”

This is a very useful tool that depends upon the above Marketing Mix and lays over it a model that illustrates the overall process of:

- Getting the attention and raising the awareness of the marketing target (person, organisation).
- Creating their interest in what we have to offer/say.
- Turning interest into desire – desire to buy the product/service, take up the idea/concept.
- Changing desire into action – buy the product/service, take up the idea/concept.
- Support post-purchase/take-up.

### Marketing Models : AIDAS



## Turning now to 'Social' Marketing.....

[http://en.wikipedia.org/wiki/Social\\_marketing](http://en.wikipedia.org/wiki/Social_marketing)

Social marketing is the systematic application of marketing along with other concepts and techniques to achieve specific behavioral goals for a social good. This may include asking people not to smoke in public areas, for example, ask them to use seat belts, prompting to make them follow speed limits.

Although 'social marketing' is sometimes seen only as using standard commercial marketing practices to achieve non-commercial goals, this is an over-simplification.

The primary aim of 'social marketing' is 'social good', while in 'commercial marketing' the aim is primarily 'financial'.

**This does not mean that commercial marketers cannot contribute to achievement of social good.**

Increasingly, social marketing is being described as having 'two parents'

- a 'social parent' = social sciences and social policy
- a 'marketing parent' = commercial and public sector marketing approaches

Beginning in the 1970s, it has in the last decade matured into a much more integrative and inclusive discipline that draws on the full range of social sciences and social policy approaches as well as marketing.

In 2007, Government in the United Kingdom announced the development of its first social marketing strategy for all aspects of health.

***Choosing Health: Making Healthy Choices Easier, UK Department of Health***

## Healthcare Marketing

At a Foundation Trust Network conference on 'Marketing in the new NHS' in September, 2006 a specialist healthcare marketing organisation NetCare suggested that the following 'marketing mix', containing nine elements (none of which begin with P!) should be employed:

### 1. Understanding Needs & Expectations

- market research
- face to face engagement

### 2. Proactive Communications

- brand and visual identity
- open days
- advertising,
- electronic media
- brochures and leaflets,
- sponsorship and public relations.

<http://ww7.investorrelations.co.uk/netcare/media/news/?ref=19&year=2006>

#### NetCare add:

Forward minded organisations will also construct feedback loops so that activity can be continuously improved in light of comments and reaction from stakeholders.

The relationships are represented diagrammatically in Figure 1 below:



## COMMUNICATION

“To communicate properly with the local community there is no alternative to the hard but rewarding work of fully engaging with stakeholders on a sustained basis.”

### Faculty of Public Health:

#### main topics that may be examined at Part A:

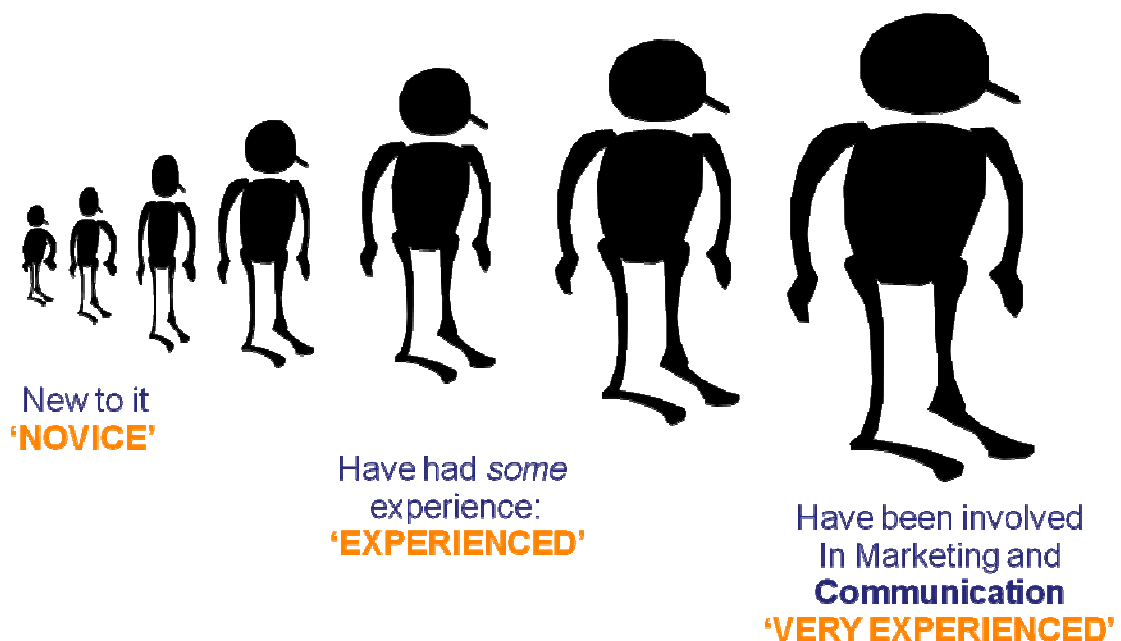
##### Communication:

- Written presentation skills
- Preparation of papers for publication
- Preparation of material for different audiences, including expert and non-expert audiences and the media.
- Information handling and use of media in advising the public about health services, disease prevention (including communicable disease outbreaks and environmental hazards) and health promotion.

*Now to create our Teams for the rest of the day:*

## The Fine Line

### Marketing and Communication





## Different Communication Roles

Organisations have different needs to communicate both externally and internally. How do you see the difference between the following activities?

<b>Activity</b>	<b>Definition</b>	<b>Features</b>	<b>Primary Objective</b>
Publicity			
Promotion			
Public Relations			
Corporate Communications			

## Different Communication Roles

### Publicity

#### Definition

The process of enlarging the profile, public visibility and awareness of a person, product, event, brand or corporate entity.

#### Features

- Publicity is all about mention in the media.
- Reporters and writers decide what will be said.
- The effect can be positive or negative.

#### Primary Objective

If deliberately sought the objective is to push via the media an awareness of the subject of the publicity for a specific purpose.

If not deliberately sought the objective of a publicist would be to turn the publicity to advantage as brazenly as necessary.

### Promotion

#### Definition

The process of keeping a product, service, or idea in the minds of customers to help stimulate demand for the product, take-up of the service or idea.

#### Features

- Promotion involves ongoing advertising.
- It also involves ongoing publicity.
- Sales and public relations campaigns are often aspects of promotions as well e.g. BOGOFs, 3-for-2, 'Sales', Free Gifts, Bonus Products.

#### Primary Objective

The objective is to actively put across key messages relating to a product, service, or idea to a target audience *such that the target audience will respond with a demand for the product, service, or idea*

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### Public Relations (PR)

#### Definition

PR is the intelligent, proactive management of an individual's or an organisation's external relationships via the media to ensure that the individual/organisation has a strong public image in the areas where it requires this.

#### Features

PR helps external constituencies to better understand the individual/organisation and therefore relate to them better. PR often includes the use of the media (newspapers, television, magazines etc) to target specific audiences. PR is often one of the primary activities included in promotions e.g. involve a celebrity, expert or specialist.

#### Primary Relations

The objective is to create and sustain positive relationships between an individual/organisation and the public in order to achieve acceptance and approval of that individual/organisation, their objectives, and their conduct in pursuit of those objectives.

### Corporate Communications

#### Definition

Corporate Communications is about the coherent management and presentation of the face, voice, and 'personality' of a corporate entity through the optimal communication of information, principles, values, stance, behaviours, objectives, plans, actions and results achieved.

#### Features

- Involves a focus on building a track record, a reputation.
- It requires a carefully thought through strategy.
- It is proactive in involving a wide mix of communications media.

#### Primary Objective

The objective of Corporate Communications is to achieve and maintain an admirable reputation for the corporate entity, its products and/or services, and those who work within it, in a way which is consistent and reflects the truth.

## Team Practical: Scenario Outline

### The Players and Purpose

- NHS South West England are to collaborate with The Princes' Trust & other key stakeholders including a Health Food Retailer, the local branches of a major firm of UK Accountants and a Gym and Fitness sites operator across the S.West region.
- The purpose is to work with Princes' Trust to encourage Healthier Eating and Improved Fitness amongst their 4 main target populations:
  - Unemployed young people
  - Young People under-achieving in Education
  - Young people leaving care
  - Young offenders and ex-offenders

### The Project

- NHS South West have agreed to participate in a Pilot in the 4 PCTs in/around Bristol
- A 6 months pilot is starting 1<sup>st</sup> February next year.
- If successful it is intended to roll this out across the whole S.West Region from 1<sup>st</sup> October next year.
- A number of staff, including yourself have been asked to work on this.
- Alongside your 0.6 duties Health Promotion duties in the PCT you are asked (0.4 for 6months) to work with the Princes' Trust project team and specifically to handle all key Communications aspects, across all Stakeholder groups starting next week, 1<sup>st</sup> December.

## A Proposed Partnership: NHS South West & The Prince's Trust Encouraging Healthy Eating and Improved Fitness for Young People At Risk

### INTRODUCTION & BACKGROUND

As part of its activities in the South West of England area the **Princes Trust** wants to encourage Healthy Eating and Improved Fitness amongst the vulnerable and 'at risk' young people that it works with across the Region.

Youth charity, the **Prince's Trust**, helps change young lives in the UK. It gives practical and financial support, developing skills such as confidence and motivation. It works with 14-30 year olds who have struggled at school, have been in care, are long-term unemployed or have been in trouble with the law. Programmes lead to young people getting back into work, education and training, as well as improving attitudes towards health, fitness and lifestyle. The Trust focuses on the following groups of young people:

- Unemployed young people
- Young People under-achieving in Education
- Young people leaving care
- Young offenders and ex-offenders

In this regard the Trust have agreed in principle with three well-known organisations to sponsor and support 3-year 'Healthy Eating' and 'Improved Fitness' programmes via the Prince's Trust:

- a well-known firm of regional/national/international Accountants who already provide mentoring and other support via their South West England management and workforce to the Prince's Trust and see this as part of their expanding Corporate Social Responsibility(CSR) strategy
- the regional division of a national pharmaceutical and health-food retailer that has outlets in the majority of cities and towns across the South West and sees this as an opportunity to increase awareness of its products and services as well as to reinforce its socially-aware policies across the region
- a national operator of Gyms and Fitness Clubs who within their expanding Corporate Social Responsibility activities wants to engage with young people,

## WORKBOOK: GETTING THE MESSAGE ACROSS

especially those at risk, and to encourage sport and fitness activities as part of routes to improving their self-esteem, self-belief.

The Trust is also making application to the Big Lottery Fund for additional support Funding for this programme when as intended it is rolled-out across the Region.

The Trust has approached the NHS South West SHA for their support and advice on the design, development and delivery of this new Programme, which is scheduled to be *piloted* in the 4 PCTs in and around the Bristol area from April, 2009. Subject to satisfactory piloting, the programme will be rolled out across the South West region the from 1<sup>st</sup> October, 2009. The Trust has also identified national interest in this Programme.

Your area is one of those selected to participate in the *Pilot* programme and thus your PCT/Local Authority together with key other Stakeholders has been approached by NHS South West to contribute to the setting up, design and monitoring of this programme.

The Manager dealing with the early stages of this project is about to go on Maternity leave and you are asked to take-on key parts of this Project and to work with others in the other PCTs and the SHA to progress.

Initial local research and scoping has been carried out and below is summarised the work that has so far been undertaken towards this project

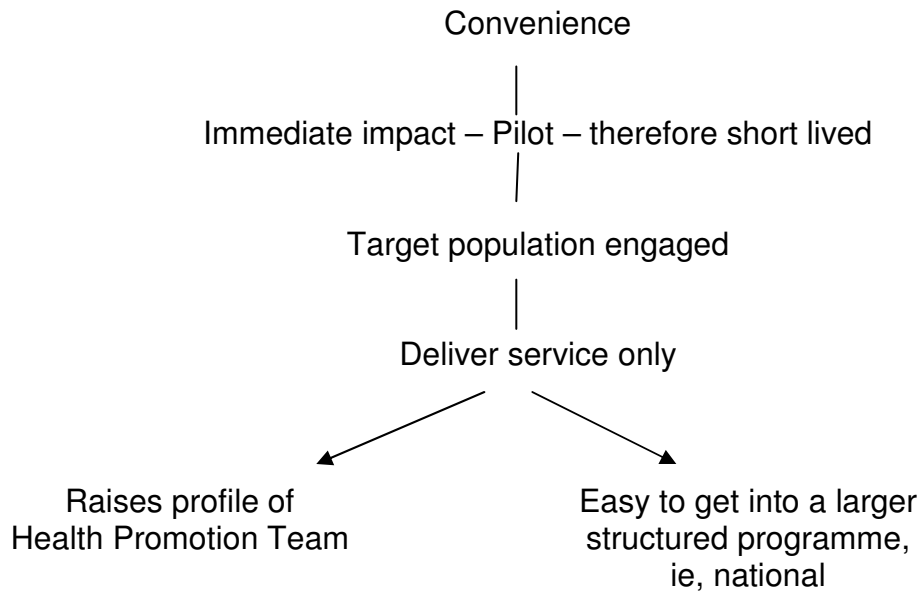
***You are asked to liaise with members of the Project Team in the other PCTs and SHA; your particular role is to construct a Stakeholder Analysis and Draft an overall Communications Plan. You are also asked to suggest appropriate Names and 'Straplines' for the proposed Programme designed to ensure engagement with the target populations.***

### **How can we contribute, what can we provide?**

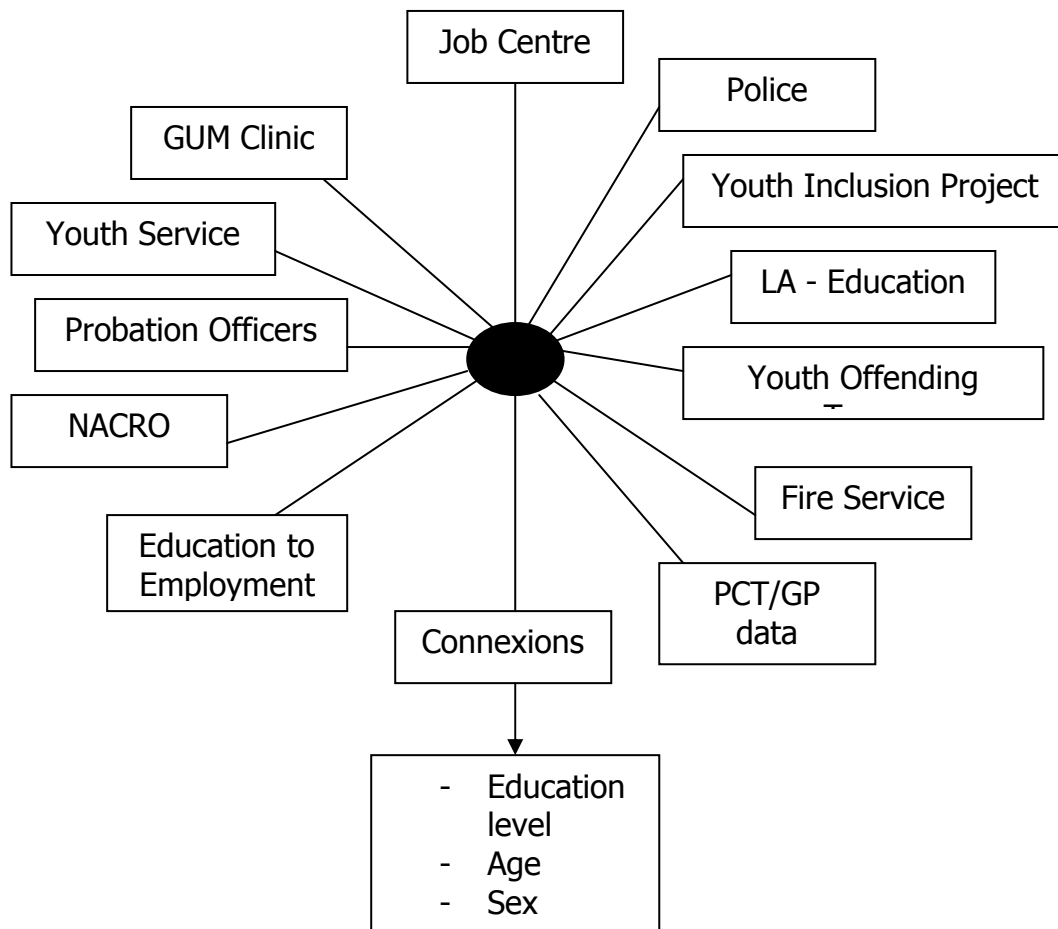
- Location of target groups, needs and health characteristics
- Detail output from the Mosaic social marketing
- Hot spot maps/ward data – where the PCT are relating to health characteristics
- Recent Needs Assessments
- Deprivation levels (education attainment) – NOMAD
- Support with a Communications and Engagement strategy

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### Health Promotion Aspects:



### Potential Support and Players : Summary:



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### TARGETING:

- Through partners, particularly Prince's Trust South West
- General information from partners about target groups and no of people they are working with and where they live, what they do
- Mosaic Profile of target group
- Look at trends on Nomad
- Look at available data:-
  - LA reports – community safety
  - PCT reports
  - ONS
  - Public Health Observatory
  - EMDA
  - GOSW
- Disability Allowance
- Census

### Other Data Sources:

Social services/children services

- Education
- DWP
- Youth offending teams/criminal justice systems/probation
- Wider young people's services
- Literacy and numeracy (begin)

### Key Goals:

- Increase healthy eating and improve Fitness in target groups
- Improve overall health and wellbeing

### Objectives/Priorities:

- Identify/target groups – research
- Plan to access/engage groups
- Overcome barriers to healthy eating
- Promotion of healthy eating via range of activities



## WORKBOOK: GETTING THE MESSAGE ACROSS

### Identify baselines (“before” “after”)

1. Measurement of obesity levels – graph/table
2. Measurement of malnutrition? – graph/table
3. Five-a-day scheme use – maps
4. Fitness levels :
  - target populations
  - general in these age groups
5. Utilisation of service/scheme – graph
6. Follow up on engagement

### Key Factors:

- Who (organisation) are overall Project Managers?
- Project Steering Group – composition and influence
- Ensuring Stakeholder accord – and strategic fit
- How to get message across to this age group (access and engagement)
- Levels of risk
- Monitoring and measures of Success

## Creating A Communications Strategy

Complete a Communication Plan. Use the template below.

Key issues	Key stakeholders	Stakeholder concerns	Key messages	Desired response	Communication medium	Timing

**Creating A Communications Strategy**

**1. Identify Key Issues**

**2. Identify Key Stakeholders**

**3. Identify Stakeholder's Concerns**

**4. Decide on Key Messages for each  
Constituency**

**5. Describe the Desired Response**

**6. Choose the most effective Communication  
Medium**

**7. Put timescales to the Communications**

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Step One – Identify Key Issues

What key issues need to be addressed in the communication strategy and plan?

**On the negative side Key Issues surrounding a communication can include combating the following threats:**

- Undertaking risk/crisis management i.e. reducing the threat to the organisation itself.
- Countering potential loss of positive image/reputation.
- Overcoming or diminishing a threat to the smooth implementation of a policy.
- Overcoming or diminishing a threat to the required results of a given project or initiative.
- Preventing the disruption to the status quo of a given operation/activity.
- Preventing a break down in relationships (internal/external).
- Pre-empting adverse financial implications.
- Preventing the loss of credibility for the organisation/key people.
- Preventing the loss of trust between the organisation and its' customers'.
- Mitigating the results or fall out of a contravention of legislation or regulation.
- Preventing the organisation as being seen as politically inept, out of touch with current thinking.
- Preventing a contribution to a wider negative know-on effect on key stakeholders.
- Preventing the undermining of the use of a new process/system.
- Preventing the undermining of the working of a current structure.
- Preventing the demeaning of the knowledge/skills of people.
- Preventing the questioning of the quality of leadership/management in a given situation.
- Others?

### Step One – Identify Key Issues (Cont'd)

**On the positive side Key Issues can include optimising the following opportunities:**

- The opportunity to share what the organisation is doing in order to create a safer more secure future for people/organisations and your organisation.
- The opportunity for image/reputation enhancement for individuals and your organisation as a whole.
- Communicating the achievement or progress of the smooth implementation of a policy.
- Communicating how expectations are being exceeded or were exceeded in a given project or initiative.
- Announcing the smooth running of a given operation/activity.
- Sharing an improvement in relationships.
- Sharing positive financial implications/results.
- Sharing achievements/successes to build the credibility of the organisation/key people.
- Sharing achievements/successes to build trust between the organisation and its 'customers'.
- Communicating successful adherence to legislation/regulation and the results.
- Being seen to 'be in touch' with current thinking by contributing to thought leadership.
- Creating a wider positive knock-on effect on key stakeholders through an initiative.
- Sharing the successful use of a new process/system.
- Sharing the successful working of a current structure.
- Talking up the knowledge/skills of people.
- Reinforcing the quality of leadership/management in a given situation.
- Others?

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Step Two – Identify Key Stakeholders

Consider the following groups of stakeholders:

#### Internal

- Own Team (within your part of the organisation)
- Other Teams (within your part of the organisation)
- Own Manager
- Other Managers (within your part of the organisation)
- Peers

#### External

- Customers
- Other teams within the wider organisation
- Other managers/peers within the wider organisation
- Suppliers
- Strategic partners
- The Media
- The general public

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Step Three – Identify Concerns of Key Stakeholders

Consider the following concerns for each stakeholder:

#### Safety/Security

Their concern is to minimise risk and to achieve a safe/secure future for themselves/their organisation.

#### Performance

Their concern is to use resources in an optimum way and to improve efficiencies.

#### Appearance

Their concern is about reputation (their's and the organisation's), and about how they/their organisation appears.

#### Convenience

Their concern is about effective ways of working which will make life easier for everyone.

#### Economic

Their concern is about financials - costs and benefits of a given situation.

#### Relationships

Their concern is about positive working relationships with other people/groups and managing these relationships effectively.

Think **'SPACER'**

## **Step Four – Decide on Key Messages for Each Constituency**

Consider the following:

### **Impact**

What is the short/medium/long term impact of the activity/event on:

- the organisation and parts of it?
- on different external constituencies?

### **Messages**

What are the essential messages to communicate:

- main (in every communication)?
- targeted to specific individuals/groups?

### **Detail**

Who needs what level of detail?

### **Benefits**

What benefits to the individual/group receiving the communication need to be stressed (SPACER)



## WORKBOOK: GETTING THE MESSAGE ACROSS

### Step Five – Describe the Desired Response

Which response(s) are you looking for:

<b>Understanding</b>	They understand more and are clearer.
<b>Decision-Making</b>	They will make a supportive decision.
<b>Problem-Solving</b>	They will resolve a problem/help to resolve a problem.
<b>Influencing</b>	They will influence others to come on board.
<b>Selling</b>	They will promote/sell the idea to others.
<b>Giving Commitment</b>	They are committed to carry out a specific action.
<b>Reviewing</b>	They will review a situation and take action.
<b>Reflecting</b>	They will reflect further and get back with a response.
<b>Acting</b>	They will continue, stop or start a particular activity.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Step Six – Choose the most effective Communication Medium

What is the best way to communicate key messages to stakeholders?

Internal	External
<ul style="list-style-type: none"> <li><input type="checkbox"/> Face to face 1:1</li> <li><input type="checkbox"/> Face to face in small groups</li> <li><input type="checkbox"/> Formalised tiered briefing groups</li> <li><input type="checkbox"/> Written communication:               <ul style="list-style-type: none"> <li><input type="checkbox"/> formal</li> <li><input type="checkbox"/> informal</li> <li><input type="checkbox"/> to individuals</li> <li><input type="checkbox"/> to groups</li> </ul> </li> <li><input type="checkbox"/> Telephone conversations:               <ul style="list-style-type: none"> <li><input type="checkbox"/> individual</li> <li><input type="checkbox"/> group</li> </ul> </li> <li><input type="checkbox"/> Formalised communication channels               <ul style="list-style-type: none"> <li><input type="checkbox"/> intranet</li> <li><input type="checkbox"/> newsletter</li> <li><input type="checkbox"/> notice-boards</li> <li><input type="checkbox"/> announcements</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Promotion campaign</li> <li><input type="checkbox"/> PR response</li> <li><input type="checkbox"/> Publicity opportunity</li> <li><input type="checkbox"/> Corporate Communications</li> <li><input type="checkbox"/> Media mix required               <ul style="list-style-type: none"> <li><input type="checkbox"/> newspapers</li> <li><input type="checkbox"/> magazines</li> <li><input type="checkbox"/> radio</li> <li><input type="checkbox"/> TV</li> </ul> </li> <li><input type="checkbox"/> press releases</li> <li><input type="checkbox"/> web-site</li> <li><input type="checkbox"/> conferences</li> <li><input type="checkbox"/> exhibitions/shows</li> </ul>

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Step Seven – Put timescales to the Communications

Consider the following:

<b>Order</b>	In what sequence will communications need to take place?
<b>Delivery Channel</b>	Who will be involved in delivery; when are they available; how quickly can they be brought up to speed?
<b>Style Of Communication</b>	What content and communications media need to be prepared?
<b>Location</b>	Where will the communication need to take place?
<b>Other Events/ Activities</b>	How can these best be factored in?

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Communication - Styles And Strategy

Given the communication and the circumstances surrounding the communication, plot below the style of communication you will need to adopt in communicating your message to a specific audience.

1. Highly structured/managed communication process						Less structured/less managed communication process
1. Communicated from the top down by senior management						Communicated from the bottom up by local personnel
2. An urgent/important message						A non-urgent/less important message
3. Formal, corporate style (no flexibility in content)						Informal, personal style (flexibility in content)
4. One way communication - no feedback						Two way communication – with feedback
5. Allows for no flexibility in decision-making/response by audience						Allows for great flexibility in decision-making/response by audience
6. Organisation focussed (organisation well-being driven)						Person focussed (individual well-being driven)
7. No response required						Response required
8. External focus on market-place And customers						Internal focus on the organisation and its employees
9. Upbeat positive communication style						Sombre, more measured communication style

***Plot the desired style with an 'X'. Summarise how you will need to deliver the communication and then make sure that everyone involved in initiating the communication understands the style requirements.***

## Mapping Stakeholders

Use the template below:

Name of Stakeholder	Scale of Acceptance. Plot the stakeholder on the relevant vertical							Influencing Style and Strategy
	Negative (-)			Positive (+)				
	Resistant/Blocker	Sceptical/Underminer	Wary/Anxious	Neutral/Apathetic	Open to be Convinced	Positive Follower	Active Supporter	

## The Importance of Communications Strategies in Public Health

Refer here to the separate Slides communicating the impacts of  
the 'Leukaemia in North Wales' Issue



**WORKBOOK: GETTING THE MESSAGE ACROSS**

**Influencing Exercise (1)**

Who has influenced you successfully in a sphere of your life?
What influencing skills did they use which were effective in influencing you?
Why were they successful in influencing you (what other factors were involved)?

*Discuss your conclusions with your partner.*

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Influencing Exercise (2)

In your group share the outputs of your paired exercise and agree the 10 most powerful influencing skills/factors which contributed to the success of effective influencers.

They do not have to be in a priority order.

The Ten Most Powerful Influencing Skills Or Factors	
Skills	Factors

*Flipchart your list of skills/factors.*



## WORKBOOK: GETTING THE MESSAGE ACROSS

### Influencing Exercise (3)

In your group share the outputs of your previous group exercise and agree the 6 most powerful influencing skills/factors which contributed to the success of effective influencers.

Again these do not have to be in a priority order.

The Six Most Powerful Influencing Skills Or Factors	
Skills	Factors

*Flipchart your list of skills/factors.*

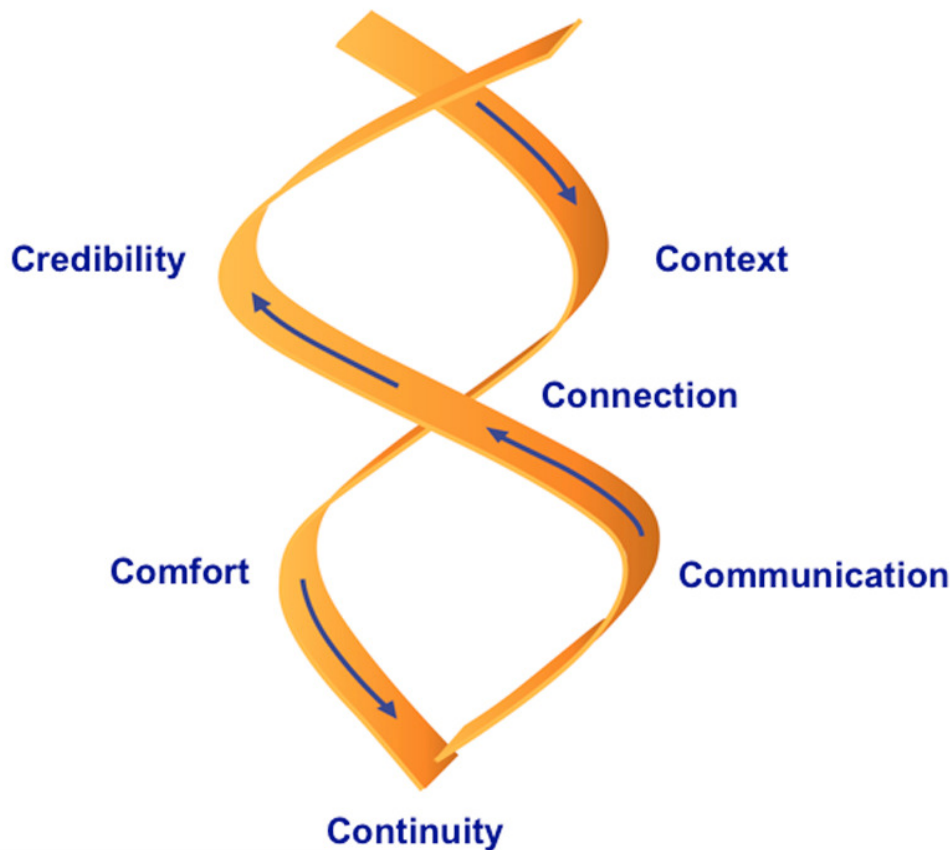
## **Self Reflection On Exercises**

**When were you successful in influencing others in your groups? Why?**

**When were you unsuccessful in influencing others in your groups? Why?**

**What have you learnt about your abilities to influence others?**

## Influencing Model – The ‘DNA’ Of Influencing



The diagram represents a virtuous ‘DNA’ cycle of the six influencing principles depicted as a six stage process.

### Connection

At the centre of effective influencing is CONNECTION (Rule of Reciprocity). An individual cannot influence another individual or a group of individuals if there is no genuine interdependence which exists between the two parties. If one party has absolute power over the other, or both parties have no need of each other, then there is no need to influence. For an effective influencing opportunity to exist there must exist an ‘Influencing Arena’ in which both parties can exert influence over one another.

CONNECTION is therefore the vital ingredient to all effective influencing and hence is located not only at the centre of the model but located in such a way that it is truly at the “crossroads” of all effective influencing.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Credibility

CREDIBILITY is often the starting point of an influencing opportunity in that if a person lacks credibility there will not be the necessary respect from the other party to even want to engage in an influencing situation. No matter what the situation or opportunity, if a person lacks credibility the chances of the other party respecting them are minimal and therefore the likelihood of the two parties 'transacting' together is also minimal. You could argue therefore that credibility is key to any influencing opportunity getting started.

### Context

CONTEXT (Social Validation) arguably is the next key ingredient to effective influencing in that a person can have credibility but if they are not in touch with, or have not bought into, social and cultural norms they will be seen as being 'out of touch' with the wider (often unspoken) rules of operating and acting. This lack of similarity can prevent or lessen their use of personal credibility and hence diminish the opportunity for effective influencing. It is vital therefore that the person understands the CONTEXT in which they are operating as fully as possible.

CREDIBILITY and CONTEXT then lead to CONNECTION which as we have said is the necessary sense of interdependency which needs to exist for two parties to be willing to influence, or be influenced by, each other.

### Comfort

If this desire for Connection exists then COMFORT (Liking) becomes a key issue as the degree to which people feel comfortable with one another, have got to know each other, and want to spend time together will have a significant impact on their desire or need to influence one another in a positive way.

Those who have not built a friendship with those they want to influence may struggle because of the lack of openness, trust and ongoing relationship perceived by the other party. Once the issue of COMFORT is satisfied then the next key ingredient CONTINUITY comes into play.

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### Continuity

CONTINUITY (Commitment and Consistency) builds trust between people because people show themselves to be consistent in their actions and behaviours and are thus deserving of being treated as a “partner” by other people. CONTINUITY in a relationship is therefore a Key Contributor to the honesty, openness and trust required between two parties for them to effectively influence one another.

### Communication

COMMUNICATION (of scarcity) is the last of the six principles and is another vitally important ingredient. If both parties in an influencing situation feel the existence of the previous five ingredients then the notion that an item or resource provided by each party is scarce further encourages both parties to want to work together for their mutual benefit. Without this COMMUNICATION of scarcity either party could walk away and find a solution to their needs and/or problems from another source. The result would be a devaluing of the need to be truly dependent on one another, which leads back on the diagram to CONNECTION and the need for true interdependency.

The cycle then proceeds on to CREDIBILITY again and the involvement of the other key principles to strengthen the virtuous circle of activity which is repeated and sustained.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Influencing Situation Analysis

Think of a situation in which you are involved and in which you are trying to influence another party or parties.

Analyse the situation using the 'DNA Of Influencing' Model.

<b>Describe the situation</b>
<b>What do you need to do to improve your use of the following:</b>
<b>Connection (increasing interdependence)</b>
<b>Credibility (improving personal credibility)</b>
<b>Context (being more in touch with social/cultural norms)</b>
<b>Comfort (improving liking and friendship)</b>
<b>Continuity (being more consistent; demonstrating more commitment)</b>
<b>Communication (reinforcing the scarcity of what you have to offer)</b>

## Influencing Style Profile

### Explanatory Notes

The feedback shown on the profile gives you an opportunity to think about how you influence other people. There are nine distinct influencing styles described below. Consider each, and, if appropriate, discuss them with the person who gave you the feedback and identify those styles that you should develop further. It is helpful to discuss your profile with another person who can help you consider how to increase your skills.

### Beliefs driven style

You present deeply-held beliefs about what is good and bad, important and unimportant. By expressing values you capture interest and goodwill. Your values touch a chord in others and your conviction is persuasive. You invoke respect and admiration. Your skills include values clarification, effective presentation and an ability to delve below the surface.

**You attract others by appealing to their moral sense.**

### Objective setting style

You ensure that aims and objectives are clearly understood by all concerned and direct efforts towards achievement. You monitor the performance of others, set success measures and provide coordinated plans. By setting milestones and avoiding being 'put off the scent', you influence situations. Your style is 'administrative' in the best sense of the word. You use management techniques to channel effort. Your skills include objective setting, action planning, performance measurement, controlling and giving feedback.

**You drive others by obtaining their commitment to objectives, then keep performance on track.**

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Helper style

You are practically helpful. You identify others' needs and show how these can be fulfilled. You work at being a useful resource to others, in problem solving. Your credibility and influence come through, being genuinely useful. Your skills include sensitivity, active listening, being people-centred, action planning and co-operative counselling.

**You attract others by winning confidence and being a valued colleague.**

### Visioning style

You create 'pictures' of a desirable future which offers better ways of doing things or redressing wrongs. You bring meaning and direction into people's thinking and give an understanding of what could happen. Your strengths are the capacity to express vivid images, imagination, opportunism, far-sightedness and practicality. You are an architect of the future.

**You attract others by providing a positive direction.**

### Logical persuasion style

You are persuasive in argument and debate. Your facts are valid. You collect data, evaluate information, build a logical case and present sound arguments. You appeal to reason and intellect. Your position is defensible and reasonable. Your skills include analysis, concept development, logical thought and formal presentation.

**You attract others by the force of argument and rationality.**



## WORKBOOK: GETTING THE MESSAGE ACROSS

### Personal willpower style

You are influential because you use 'weight' to cajole, demand, insist or push people to act differently. You have a forceful, controlling and dominant style, although this may be very subtle in expression. You are prepared to make a fuss to get change. Your skills include deep knowledge of people, assertion, and the constructive use of conflict.

**You push others by personal willpower.**

### Authority style

You obtain formal authority to give a power-base. You want to obtain powerful positions and build a legitimate role. You seek to acquire the right to decide how to allocate resources to further a cause. You concentrate on getting the foundation properly laid. Your skills include organisational design, planning, performance control, and administration.

**You drive others with legitimate power.**

### Catalyst style

You expose people to new ideas, experiences, concepts, possibilities or inner reflections. You act as a teacher, educator, catalyst, counsellor and guide, enriching people's experience through demonstration and the opening of minds. You cause people to discover that their current thinking/behaviour is, in some ways, inadequate. Your skills include diagnosis, designing learning, communication principles and teaching.

**You attract people by causing them to re-evaluate the world around them.**

### Coaching style

You encourage and empower people to identify needs, evaluate options, formulate action programmes and take initiatives on their own account. You are supportive and positive, adding extra energy and giving confidence. You do not seek to guide, but to enable others to act. Your skills include listening, counselling, giving positive feedback and advising. You give permission to act, moral support and, sometimes, practical support.

**You drive others by giving them energy.**

## Influencing Styles

Write down your five most favoured influencing styles. Alongside each make notes of the strengths and dangers of each style when it comes to influencing others.

<b>My five most Favoured styles</b>	<b>Strengths of each</b>	<b>Dangers of each</b>
1.		
2.		
3.		
4.		
5.		

## Putting the Message Across

<b>What do good speakers do that enables them to succeed?</b>	<b>What do poor speakers do that causes them to fail?</b>

## **Presentation Skills**

### **How To Put Your Message Across Effectively**

#### **Content**

- Be well prepared.
- Know your subject.
- Be well rehearsed.
- Cover the right amount of material in the time available - not too slow or rushed in your delivery.
- Be well organised, particularly in the use of visual aids.
- Ensure that your presentation is clearly and logically structured; it is easy to follow.
- Make your visual aids powerful and memorable.
- Ensure your handouts are useful.
- Use words and expressions familiar to the audience.

#### **Delivery**

- Vary the pitch and tone of your voice.
- Vary the pace of your delivery.
- Speak at an audible level, not too softly or loudly.
- Use pauses effectively to put across key points, pausing before and after key points.
- Ensure your diction is clear; your pronunciation of words correct.
- Use a style which is conversational, as though having a one-to-one conversation with everyone in the room at the same time.
- Use humour appropriately.
- Have no vocal distractions e.g. ums, errs, ahs, etc.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Appearance

- Be calm and relaxed.
- Smile to show that you are at ease and want to talk to the audience as friends (versus the enemy!)
- Use direct eye contact with individual audience members to make them feel included; take in all members of the audience rather than looking at certain people, or one section of the audience all the time.
- When not moving about stand upright, your body weight evenly distributed through your two legs.
- Move about easily and deliberately to engage with the audience; do not stand rooted to the spot.
- Have a good upright posture whether standing or moving about.
- Use your hands and arms appropriately to demonstrate and reinforce points or to illustrate key messages; your gestures should be deliberate and controlled, not repetitive and distracting.
- When not gesturing, put your hands into a 'rest' position, about waist high, in front of your body; this rest position is natural and not distracting.
- Ensure your clothing fits you and is appropriate for the occasion.
- Your hair should be well groomed.
- If a male, your tie should be done up to the top of the collar and your shoes should be in good condition and polished.

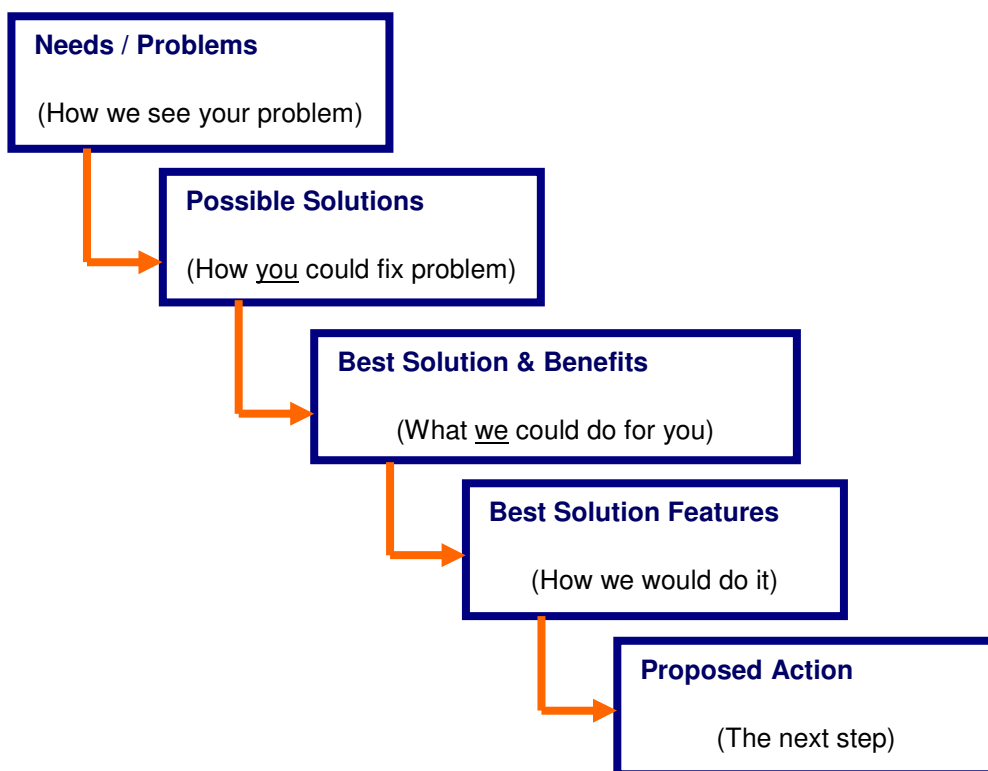
### Mind-Set

- You want to 'engage' with the audience versus seemingly just wanting to get the presentation over and done with.
- You picture success and have a positive (but not arrogant) self-image.
- You believe passionately in what you are saying; you have genuine self-belief as well.
- You view the presentation as a learning experience for yourself as well as the audience; you are not afraid to engage in a two-way dialogue.
- You want to be genuinely helpful to your audience and are keen to follow-up the presentation in the best way possible.
- You do what they say they are going to do.

## Preparing Yourself

- **Positive self talk**  
Picture success, create a positive self-image and perform to that image.
- **Believe in audience's goodwill**  
They want you to succeed, want to be interested and entertained.
- **Be the performer**  
Act 'as if' you are in charge, behave in a way that you want to be seen, smile and you look and feel relaxed.
- **Believe in what you're saying**  
Be thoroughly convinced about the worth of your message.
- **Prepare thoroughly**  
Know your presentation 'inside out'.
- **Rehearse**  
In a mirror, to yourself, out loud, smooth out the 'blind-spots'; be confident about the timing; practice with visual aids.

## Structuring A Persuasive Presentation



Stage	Requirement	Notes
<b>Needs / Problems</b>	Demonstrate that you have a clear understanding of the client's needs and problems ensuring you talk their talk using their jargon when appropriate.	Client's current situation in terms of costs / risk / loss of benefits.
<b>Possible Solutions</b>	Demonstrate that you have thoroughly investigated a number of potential solutions that <u>they</u> could implement (including doing nothing with the potential downside that entails).	This again demonstrates a clear understanding of the client's business.
<b>Best Solution &amp; Benefits</b>	Recommend your own solution as the best solution and clearly establish the benefits to be gained from following your recommendation.	Client's preferred future situation in terms of reduced costs / reduced risk / increased revenues/easier life/improved efficiencies etc.
<b>Best Solution Features</b>	How the proposed solution will be put into effect - in other words what will be done and by whom.	Refer to the big picture of what will happen, 3 to 5 steps perhaps - the detail comes later.
<b>Proposed Action</b>	Suggest a next step and obtain the client's agreement i.e. "I'd like to propose a meeting next Tuesday to discuss the project in detail."	Get their agreement so that when you leave the meeting you are in control of the next step rather than waiting for them to initiate any action.

## **Structuring An Information Giving Presentation**

You have a number of options depending on the topic and your objective. Here are some popular outlines.

### **1. SHARING RESULTS OF A FACT-FIND OR PROJECT**

- Background/context to the activity.
- The objective of the activity.
- The process used to deliver the activity.
- Roles and responsibilities of those involved in the process.
- Findings of the fact-find/project.
- Conclusions.
- Possible, or recommended, next steps.

### **2. EDUCATING OR INSTRUCTING ON A TOPIC (TO ENHANCE PEOPLE'S KNOWLEDGE)**

- Definition of the topic.
- History of the topic.
- Current thinking/approaches to the topic.
- How people are applying their knowledge of the topic.
- What results they are achieving.
- Suggestions as to how the audience might engage with the topic and gain benefit from the experience of others.
- Possible, or recommended, next steps.



## WORKBOOK: GETTING THE MESSAGE ACROSS

### 3. COMPARING DIFFERENT APPROACHES TO A TOPIC (TO HELP PEOPLE MAKE AN INFORMED CHOICE)

- Take a time orientated or geographical approach:
    - e.g. In the 1980's (outline the approach)
    - In the 1990's (outline the approach)
    - Today (outline the approach)
    - In the next 5 years (outline the approach)
  - OR
  - In the USA (outline the approach)
  - In the Far East (outline the approach)
  - In Europe (outline the approach)
  - What this means when it comes to global trends is (outline the approach)
- Draw conclusions.
  - Relate your conclusions to your audience,
  - Highlight key issues to be addressed.
  - Suggest possible ways to address the key issues.
  - Stress the benefits of different solutions.
  - Possible, or recommended, next steps.

### 4. EXPLAINING A CONCEPT OR MODEL

- Explain the need for the concept/model. (Problems, needs, issues which the concept or model is designed to address).
- How the concept/model evolved.
- Description of the concept/model you want to put forward and why.
- Benefits to be derived from the use of the concept/model.
- Prove of benefits (providing examples of other users and results achieved).
- What audience can do to find out more.

### 5. EXPLAINING/DEMONSTRATING A PRODUCT, SYSTEM, OR SERVICE

- Describe the gap the product, system or service is designed to bridge.
- Describe how it works (features).
- Share the results (proof).
- Stress the benefits (tangible/measurable financial benefits).
- Use worked examples/case studies to relate the benefits to the audience.
- Possible, or recommended, next steps.

## How To Structure A Presentation

### Beginning

- Begin with a “bang”—arouse some human reaction/interest/curiosity/concern/etc.
- Tell your audience of the journey you are going to take them on, sign post the way ahead - make them want to join you on the journey.
- Set out a definite plan for your presentation that you can refer back to, tell the audience when they may ask questions.
- Adjust your plan in the light of audience feedback, but avoid taking questions during your presentation. They will break it up and impact your timing and key messages.

### Middle

- Keep linking your points—use signposts.
- Tell your audience as you approach new points so they know you are changing direction.
- Link the points to the plan you gave in your introduction.
- Making your points:
  - State your point clearly and then illustrate it.
  - Be sure that the illustration does not over-shadow the main point.
  - Use comparisons that catch the imagination.
  - Use examples and illustrations that your audience can identify with and relate to - think of their special interests and knowledge.
  - Have three key messages to put across – present them in your Beginning, Middle and Conclusion (tell the audience what you are going to tell them; tell them; tell them what you have told them).
  - Make sure that your key points stand out from the rest, make them memorable.
  - Keep your messages simple; pictures, graphics, diagrams, illustrations will help; use them strategically in your structure for maximum impact (e.g. at the start and end of a section).

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Middle

- Use word pictures, make visual comparisons.
- Try not to make a point that you intend to refute later in case you are interrupted and fail to complete the argument.
- Try to avoid lists of facts/figures/names etc, unless you can show them on a visual aid.
- If you are going to speak for more than 10-15 minutes prepare some visual aids as well as notes.

### Conclusion

- Draw something definite out of your presentation—conclude, recommend, sum up, look to the future, suggest the next step, etc.
- Summarise what you have already said.
- If you cannot draw out anything new then state your case in different words.

## How To Handle Audience Questions

### Handling Questions — Always

#### Anticipate

- Likely questions, have back-up information ready.

#### Listen

- With full concentration, looking at questioner.

#### Acknowledge

- e.g. 'Thank you that is an important point'.

#### If complex

- Jot down key points.
- Rephrase to check you have understood, this can also give you time to collect your thoughts.

#### Is question of

- If it is, answer it with appropriate general interest detail.
- If it is not, give a brief answer and maybe add something like
- perhaps we could discuss this further privately'.

#### If you don't know the answer

- Say you haven't got the information but you will get it and send it to questioner.
- Possibly consider asking the audience, e.g. 'Would anyone care to comment on this point?'

#### Beware the double edged question

- Sometimes this is used to discredit the speaker eg '*I know last month's figures were very poor, so what do you think this month's will be?*' Deal with the first statement then answer the question.
- Do not simply answer the question, this can give the impression you agree with the statement or that you haven't got a suitable explanation.

## **Overcoming Objections**

### **Process**

There is a 'process' for handling objections that can help you in this area.

The steps are:

- Anticipate
- Be pleased that the point has been raised, let them talk.
- Find out the underlying reason for the objection(s).
- Sympathise with the point of view.
- Answer the objection at once.
- Seek agreement and thank.

## The Effective Use Of Content Including Use Of Words, Sentences And Paragraphs

### The Use Of Language

The role is to be natural and human, not unnatural and pompous. If in doubt ask yourself 'what would I say face to face?' Write more like you speak.

Letters or reports become more difficult if they include:

- Long words
- Long sentences
- Long paragraphs.

### Words

Small words are easier to read than long words because they are easier to recognise and interpret. We get more practise in using the words we speak—so when we see a word which we do not use in conversation it is harder to understand.

Use a short word (or even two or three) instead of one long one. However, we need some long words—provided they are generally used in speech between writer and reader. Try to keep long words **below 10%** of the total by cutting out the unnecessary ones.

To make sure your words reach and convince the reader—whether a client receiving a letter or a manager reading a report—you should choose words that are clear, brief, specific, concrete, lively, concise, honest, and accurate. The aim is to express rather than impress, to communicate rather than confuse.

Be sure to use words whose meaning you and your reader both understand.

## Brevity

### Be brief and avoid:

discontinue  
submit for consideration  
proceed  
commence  
occurrence  
despatch  
make modification to  
demonstrate  
necessitate  
utilise  
implement

### Be specific:

several  
as soon as possible  
in London  
make cuts

### Be concrete:

the individuals  
graphic illustration  
the account concerned  
disappointing results

### If you can, write:

stop  
propose  
go  
start  
event  
send  
modify/change  
show  
need/require  
use  
do  
  
five  
by 9.00am on Friday  
at Victoria Station  
reduce overheads by 25%p.a.  
  
John and Joe  
pie-graph  
our client Mr Smith  
15% drop in profits

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Be clear, avoiding business jargon:

We would be grateful if

Please

Please find enclosed

I enclose

At this present time

Right now

It is a not unjustifiable assumption that

I assume that

With respect to

about

### Be concise:

an output of 750 per day

a daily output of 750

crisis situation

crisis

verbally tell

tell

assets on the plus side

assets

another alternative

an alternative

mutual compromise

compromise

future prospects

prospects

have the effect of widening the gap

will widen the gap

***Clarity and accuracy are even more important than brevity.***



## WORKBOOK: GETTING THE MESSAGE ACROSS

### Clichés

The first phrase that comes to mind is rarely the most accurate or helpful. Often, too, such catch phrases ring false to the reader. Fresh words, by contrast, convince and inform the reader.

*Tried and true phrases do not put a little icing on the cake, nor do they kill more than two birds with one stone. Look before you leap into them.*

*Overused phrases add nothing to your writing and communicate little. Shun them!*

The following doublespeak sometimes found in written communications illustrates the insincerity as well as the woolliness of clichés:

Correct me if I'm wrong.

It won't take long.

I'll be in touch.

Off the record.

Strictly off the record.

You will appreciate the fact that.

We have matters under control.

...Carefully considered.

I'd be grateful if...

Far be it from me...

We're taking care of it.

With due respect.

You and I both know.

Don't contradict me.

It may take months.

You won't hear from me soon, if ever.

I've told twenty-five people.

I've told hundreds of people.

You're not going to like this.

I have no idea what you're talking about.

...I've not had time to read it.

You'd better do it, or else.

I know better.

I don't know what you're talking about.

Thinking very little of you as I do.

You don't know, but I'm telling you.

*'I know you mean what you say, but do you say what you mean?'*

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Specific words and active verbs

Not all writing can be concise. Precision is often as important as concision. Don't forget: **It's not good enough to write so that you will be understood; write so that you cannot be misunderstood.** For example: the word 'several' is often used when it may specifically relate to 'five'; 'soon' is reported as opposed to 'by the end of this week' or 'within three days'.

Readers find it easier to understand specific examples. Consider the sentences below. Which is more specific?

*'Your gift could mean a better life for some of the world's poorest people'*

*'£1.00 could buy vaccine for 30 Indian children against measles, diphtheria and whooping cough. £5.00 could buy a yoke of oxen in Senegal.'*

Abstract words and phrases distance the reader and dull impact; your sentences will have more force and concision if you choose **active verbs**.

Generally, **passive** verbs or sentences are ones in which the action of the verb is done to the subject. For example: 'the company restructuring **was effected** by management' (passive). In the **active** voice this becomes: 'managers restructured the company'.

Passive writing is 'wordy'. It increases sentence length and reduces impact.

**Be aware that in formal reports, the active is not always appropriate** (because of legal implications for example), but use it when you can.

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Split infinitives

Although infinitives appear as two words in English (to go, to decide, to work), English grammar regards them as one unit. It is bad style, therefore, to split an infinitive, as in:

- `To boldly go'.
- `To formally propose'.
- `To generally agree'.

Rearrange the sentence to keep the infinitive as a unit:

- He promised **to go boldly** where no man had gone before.
- She wanted **to propose formally** that the company be restructured.
- Consultants were able **generally to agree** about the format of the meeting.

### Extra words

You may find you fill sentences with words you don't need. Sometimes small words are attached to verbs that would be quite strong enough without them:

- Move (around) in a circle.
- Try (out) a new procedure.
- Write (down) the minutes of the meeting.

At other times, these extra words (known as redundancies) are almost funny:

- Another alternative (an alternative is by definition another).
- A few short days (days are always 24 hours long).
- Future prospects (by definition, prospects are in the future).
- Final conclusion (a conclusion is final).
- Very unique (a unique thing is one of a kind).

Extra words aren't always redundant in the strict sense, they may fall into the category of `businesses'—a language described by Edwin Newman in his book *A Civil Tongue* as 'gassy, boneless language in government, academia, and business'. Consider these examples:

- In my opinion it is a not unjustifiable assumption that...(I believe/think).
- With respect to...(concerning/regarding).
- Met with the approval of...(was approved).
- At this point in time...(now!)

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Euphemisms

Euphemisms are 'polite' ways of saying something nasty. For example, dustbin men in America are 'sanitation engineers'; on aeroplanes 'hostesses' no longer pass the 'sick-bag', instead, 'members of the flight personnel' pass the 'motion discomfort bag'.

Euphemisms should be avoided. There is almost always a way to write the truth without giving offence.

### Jargon

Any specialist language used by members of a group among themselves is jargon to others.

Within your professional world there is a specialist vocabulary with precise definitions which will readily be understood by your readers. Problems arise when your readers don't speak the 'jargon' language.

Clear thinking, knowledge of your audience and the appropriate use of the 'exclusive' vocabulary, will help you to cut down on jargon.

### Stereotyping

When using language that refers to gender, there is a fine balance between sensitivity to words and their overtones, and verbal acrobatics made to avoid stereotyping.

As a guide, never hide gender if it is significant and don't break the rules of grammar to avoid mentioning gender.

Often a plural noun will help you to avoid verbal gymnastics:

- An employee who wants **his/her** pension intact should...
- **Employees** who want **their** pension intact should....

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Sentences

A sentence is a unit of complete thought that makes sense on its own. Sentences are separated by major punctuation marks, but also divided by minor punctuation marks.

**Major punctuation marks** show the end of a statement [.] question [?] or exclamation [!] In addition, two closely linked statements may be joined with a 'weaker' mark, the colon [:], or semi-colon [;]. **Minor punctuation marks** show small pauses in thought, either to clarify the sense or insert extra information: [,] [""] ().

Aim for:

- Sentences of varied length that average around 20 plus words
- Active verbs that add force and reduce words where appropriate
- A clear focus for each sentence, the first part should contain the key idea.

A common fault is the use of overlong sentences. Simple sentence structures are likely to produce clearer writing than long sentences. Ask yourself:

- Is the sentence saying two or three different things? Can they be more clearly expressed in separate sentences?
- How many linking words such as `and' and `because' have I used? Could they be replaced with full stops?
- Have I over-used `who', `which' and `that'?
- Is information placed in brackets actually a complete sentence in itself?

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Paragraphs

Studies show that the concentration and comprehension of a reader improve significantly when reading short paragraphs. Paragraphs should, therefore, divide up a piece of writing so that it's easier to read. Bank reports frequently explore complex and wide ranging issues and one theme or topic may require a long paragraph to cover the ground adequately.

Aim for:

- Paragraphs that state their theme clearly in the first sentence.
- Paragraphs containing no more than twelve sentences.
- Paragraphs containing no fewer than five sentences, except for effect.

At the beginning of each paragraph, ask yourself:

- 'What is the key point I want to make?'
- 'Do I need to start a new paragraph, or am I still on the same theme?'

State the key point clearly, or raise it as a question. The following sentences should then qualify, or in some way further develop, that key point. At the end of each paragraph, as a final check, ask yourself:

- 'Do all the points in this paragraph relate to the main theme?'
- 'Is the main theme stated clearly at the top of the paragraph?'

## Writing For Easy Comprehension

### The Clarity Index

We have established that long words and long sentences make things more difficult to read. Sentences loaded with meaningless, windy phrases and long words do not communicate. The style of The Daily Mail or The Express is an ideal to aim for in most cases: a clarity index of 25 to 30. Aim for 25 to 30 for reports, 20 to 25 for letters, and 15 to 18 for memos, notices, and e-mails.

You can measure the clarity of your own writing by using a simple formula, as follows:

1. Choose two samples of 100 words.
2. Count the number of major punctuation marks in each sample (full stops [.), question marks [?], exclamation marks [!], colons [:], and semi-colons [;]).
3. Divide the result into 100 to find the average number of words per sentence in each 100-word sample, and record the average sentence length for each.
4. In each sample, underline all words of three or more syllables.
5. Calculate the percentage per sample of words of three or more syllables.
6. For each sample, add the average number of words per sentence to the percentage of long words. The two answers, averaged, give you your clarity index. For example, if your sentences average 20 words and the percentage of long words is 15%, your clarity index is 35.

**WORKBOOK: GETTING THE MESSAGE ACROSS**

*An example*

<b>A</b>	<p><b>Average sentence length</b></p> $\frac{\text{Number of words in word sample}}{\text{Number of major punctuation marks}} = \frac{200}{10} = 20$
<b>B</b>	<p><b>Percentage long words</b></p> $\frac{\text{Number of long words}}{\text{Total number of words}} = \frac{30}{200} \times 100 = 15\%$ <p><b>A + B = 35 = Clarity index</b></p>

*For your own use to assess the clarity index of a piece of your own writing.*

<b>A</b>	<p><b>Average sentence length</b></p> $\frac{\text{Number of words in word sample}}{\text{Number of major punctuation marks}} = \frac{\quad}{\quad} = \quad$
<b>B</b>	<p><b>Percentage long words</b></p> $\frac{\text{Number of long words}}{\text{Total number of words}} = \frac{\quad}{\quad} \times 100 = \quad \%$ <p><b>A + B = \quad = Clarity index</b></p>



### Using the Clarity Index

The clarity index gives a statistically reliable measure of how easy sentences are to read. It cannot however measure everything; use it as a doctor uses a clinical thermometer—as a guide to the general health of your writing.

If the index is below 20, the text is probably too abrupt and staccato. Over 35 or 40, on the other hand, suggests that you are padding your writing too much. The ideas come across less clearly, and your writing may be difficult to read. Look for long sentences and long words, then prune or simplify as much as possible.

In conversation most people use an index of 25 to 30. Thus a rough rule is that if you visualise your reader and write as you would speak in the same circumstances, your index will average 25.

***It is not good enough to write so that you will be understood; write so that you cannot be misunderstood.***

## **How To Plan Effective Written Communications**

Here is a checklist to help you plan written communications.

- Do you need to write?  
Would a face-to-face or telephone conversation be better?
- Have you gathered all your ideas in note form on the topic you are addressing?
- Have you identified accurately the recipient of your communication – their level in their organisation, their knowledge/experience of the topic, their objectives, needs and problems?
- Have you considered where the recipient will read your communication and how much time they will have to do so? This will impact the length, tone and style of your communication.
- Have you identified your aim in writing to the person(s)? Is it informing or influencing?
- Have you structured the content in line with your aim? Is there a logical sequence?
- Does the first sentence of each paragraph introduce the main theme of the paragraph?
- Have you kept the average sentence length to 20 to 25 words? Shorter sentences are easier to read and understand.
- Have you kept the paragraph length to 10 lines? Again it's easier to read short paragraphs and understand their content.
- Have you kept the use of long words (e.g. words of 3 syllables or more) to 10% in your writing? Shorter words are easier to read and understand.
- Have you avoided the use of abbreviations and/or jargon not likely to be understood by the reader?
- Have you addressed the person correctly and in the right style (informal or formal)?
- Have you included the right enclosures?
- Have you copied in the right people on your communication?
- If you were the person receiving this written communication would you be clear on the key messages? Would you be likely to respond in the desired way?

## WORKBOOK: GETTING THE MESSAGE ACROSS

### Evaluation

- What worked well for you today? (PINK)
- What key learning points will you take away and put into practice? (YELLOW)
- What are your Future Learning Needs? (GREEN)
- What could be improved – and how? (BLUE)

**Please place your completed Post-Its on the relevant parts of the Wall**

*Thank You*

# Getting the Message Across Learning Log

.....

## PERSONAL LEARNING LOG

NAME:

DATE:

.....

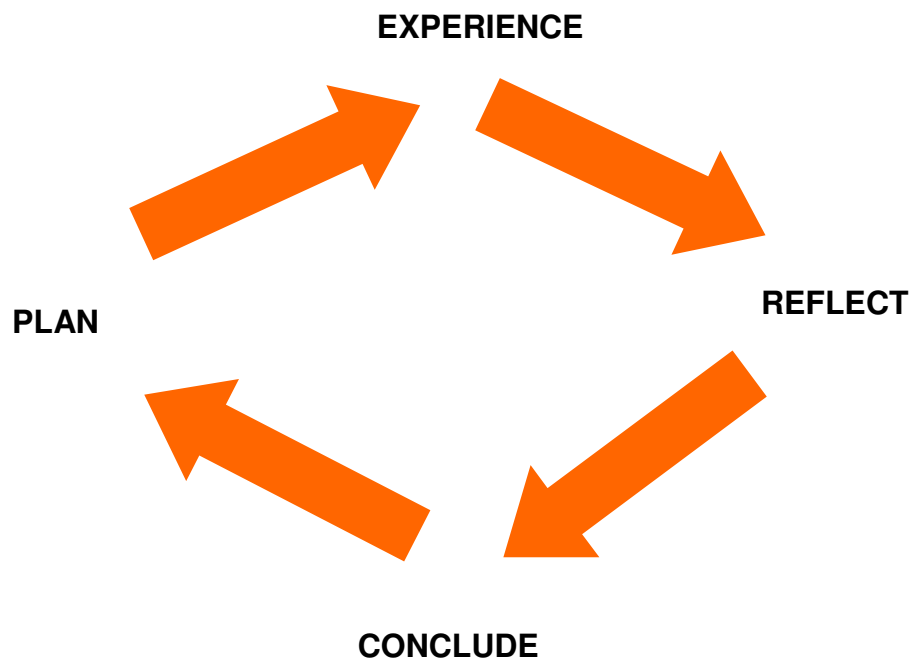
***THIS DOCUMENT IS DESIGNED TO HELP YOU BUILD ON THE LEARNING AND ACTIVITIES FLOWING FROM YOUR INVOLVEMENT IN THE 'I & I' PILOT WORKSHOPS. THE LEARNING LOG AND ITS CONTENTS ARE CONFIDENTIAL TO YOU***



## WORKBOOK: GETTING THE MESSAGE ACROSS

The Personal Learning Log is intended as a record of all the learning points that you gain during the training programme. The Learning log is a way of capturing the key points that you want to remember.

The Learning Log is made up of a series of blank pages - one for each workshop in which you have participated. These pages are based on the learning cycle shown below.



- You have a learning experience, be it a training session, workshop, a group discussion or syndicate exercise
- You reflect on the experience
- You come to various conclusions, identify some further activities and/or learning you would find useful
- You plan to incorporate your conclusions in your working and/or personal life

***Please complete this Learning Log at the end of each Workshop that you attend.***

## **GETTING THE MESSAGE ACROSS**

### **EXPERIENCE**

What main areas of Content were covered and how?

### **REFLECT**

What are the main learning points for you?

### **CONCLUDE**

What conclusions have you reached about the knowledge/skills/processes you have gained and need to develop further?

### **PLAN**

How will you use these new skills/knowledge/processes in your work? How will you build on them? What actions do you plan to take? And when?

**WORKBOOK: GETTING THE MESSAGE ACROSS**

**ADDITIONAL PAGES FOR YOUR NOTES**

**WORKBOOK: GETTING THE MESSAGE ACROSS**

**ADDITIONAL PAGES FOR YOUR NOTES**