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Chapter One

Communications Smart

Principle: Staying succinct and focused

Strategy: Get key points across within the audience's limited attention span

The absolutely necessary soft skill is good communication: the ability to successfully convey to the audience what we want them to know. Those who are successful in their professional field are almost certainly good communicators.

President Ronald Reagan and Dr. Stephen Hawking have one thing in common: being the greatest communicators in their respective fields. President Reagan owed his success in garnering congressional support for his policies to his excellent skill at persuasion. Dr. Hawking, a very popular theoretic physicist, owes his popularity to his ability of explaining to laymen the esoteric concepts of black holes and time–space relationships in an easy-to-understand fashion. (Hawking has achieved this feat in spite of his severe handicaps in speaking and writing.)

Communication is not simply about writing articles or giving speeches. It is the ability to enable listeners and readers to understand what we are trying to convey to them. Accordingly, we must focus on what we want to deliver in a way that our audience can comprehend and appreciate.

Practicing the following rules, defined later in this chapter, can help us achieve deftness in being Communications Smart:

- Being always ready for elevator pitches/speeches
- Mastering a presentation by mastering the onset
- Using three diagrams to simplify complexity

Fast-Tracking Your Career: Soft Skills for Engineering and IT Professionals, First Edition.
Wushow "Bill" Chou.

- Sizing up and resonating with the audience
- Being careful of careless comments
- Using plain language
- Using jokes and self-deprecating humor
- Being heard by listening (Refer to Chapter 2, People Smart, for a general discussion of this rule.)
- Making a convincing presentation by making a well-crafted presentation. (Refer to Chapter 3, Marketing Smart, for a general discussion of this rule.)

RULE 1: Being always ready for elevator pitches/speeches

Be prepared to articulate short pitches at any brief opportune encounter in order to make the right impressions with the right people.

We all have had the experience of a chance encounter, such as in an elevator or at a cocktail party, with someone we would like to impress. We may also have had the experience of expected encounters with unscripted questions, such as during a job interview. In such situations, we usually have only a couple of minutes to say what is needed to impress our listeners.

Of course, we can form a response on the spot. Indeed, some people are very talented at launching a good pitch without prior preparation. But for most of us, it is more likely that we can give a better response if we are prepared.

It is therefore prudent for most of us to prepare a set of "elevator pitches" for those situations in which we need to answer questions on the fly. These pitches can also be tweaked as situations change—undoubtedly, some will need to have different versions for a different audience.

If we do encounter the need to give an unprepared short pitch and we are unable to give a good one right away, we can use a three-point response strategy to make up a pitch as shown in an example later in this section.

One important point: when delivering an elevator pitch, it should sound like an ongoing conversation, not a recitation from a prepared written statement.

The elevator pitch as it has been discussed so far is used as part of a conversation or Q&A. There is another type that is used as a response to an expected request for a short speech/presentation to a group of people. For distinguishing the two types, I shall name this variation as "elevator speech." The occurrence of needing an elevator pitch is much more frequent than that of an elevator speech. However, when we encounter an unexpected need to give an elevator speech on the spot, we can be in quite an awkward situation if we are not prepared and do not have anything meaningful to say.

Example: A good "elevator pitch" led to a promising career

Vincent worked as a part-time caddy at a golf club when he was a university student. He was frequently assigned to the same elderly gentleman. During a seemingly casual conversation, Vincent's comments about a market trend impressed the old man. The next day, the part-time caddy got a call from a Wall Street company and was offered an internship position. It just so happened that the elderly gentleman was the CEO of the company.

After Vincent graduated, he joined the firm. In the ensuing years, he became a protégée of the CEO, and today, Vincent is a senior VP at another large Wall Street firm.

Example: Well-prepared "elevator pitches" led to passing a PhD exam with ease and a prompt promotion

Eddy was working toward his PhD at a university. One process he had to go through was an oral exam with a committee of three faculty members. A typical student would put most of his attention on hitting the books. Eddy took a slightly different approach. From his standpoint, an oral exam consisted of several Q&As, so the best strategy was to prepare a set of "elevator pitches" to potential questions. With this in mind, he sought out those who had been previously examined by anyone sitting on his oral exam committee. He collected a large number of questions that had been asked by these committee members and prepared an "elevator pitch" for each question. (A typical student would also collect potential questions, but not as methodically and thoroughly as Eddy did.)

Sure enough, some of the same questions were asked during Eddy's oral exam, and he was able to answer them with ease. He not only passed the exam, he also impressed the professors on the committee.

One committee member was the department chair. After the exam, he promoted Eddy from the position of teaching assistant to that of teaching fellow.

Another committee member later claimed that of all the oral exams in which he has participated, Eddy performed the best. He has since helped Eddy's career in a variety of ways.

Example: Enormous embarrassment for having not prepared an "elevator speech"

The IRS (Internal Revenue Service) has over 10,000 IT professionals and other staff supporting its IT systems, and its IT organization has several divisions. Thus, a division-wide meeting for IT professional staff often needs to be held in an auditorium.

When I was the Deputy Assistant Secretary for Information Systems and Chief Information Officer at the US Department of Treasury, I had the responsibility of overseeing the IT operations of all bureaus, including the

IRS, under the Treasury Department. One day, I got a request from an IT division director at the IRS to present an award to a staff member in his division. I agreed. My plan was simply to walk in at the appointed time, present the award, congratulate the award recipient, and leave right away. When I arrived at the appointed time and place, I was a bit taken aback. I walked into an auditorium where the division was holding an annual professional staff meeting. When I walked in, the division director, probably out of courtesy, asked me to make a short comment to the several hundred IT professional staff attending the meeting in the auditorium. I was utterly unprepared and mumbled two minutes of nothing in my strong accent and broken English. (When I do not know what to say, my accent becomes stronger and my delivery of English becomes worse.) I was extremely embarrassed, to say the least.

This experience gave me a good lesson. From then on, whenever I go to a gathering, I always prepared a short elevator speech, just in case.

EXAMPLE: Using a three-point response to make up for an unprepared "elevator pitch"

Jon Huntsman, a popular former governor of Utah, ex-US ambassador to China, and ex-US ambassador to Singapore, is known for his three-point responses to almost any question. In responding to a reporter's query about this, he gave a three-point response: "It is easy to answer, easy to stay on top of, and easy to do" (p. 8, *Newsweek*, June 27, 2012).

Using the lexicon of this book, Huntsman's three-point response is essentially an unprepared "elevator pitch" to a spontaneous question. Here is my take on why the three-point response is an excellent way to deliver a good "elevator pitch" to an ad hoc question, to which we do not have a ready answer. (1) It buys us time to think of an appropriate response. While we are saying, "This issue has three points, the first point is . . . ," we have about 10 seconds to think of how to begin answering the question. (2) While we are expressing the first point, we gain additional time to formulate in our mind the second and third points. (3) Consequently, we have a better chance of leaving the impression that we are organized, knowledgeable, and intelligent.

Personally, I have used this approach to my advantage multiple times.

RULE 2: Mastering a presentation by mastering the onset

Summarize the key points at the onset of a presentation or a written report.

Depending on presentation length, key points at the onset could mean 1 or 2 minutes to 5 or 6 minutes for an oral presentation, or one or two sentences to about one page for a written report. This helps the audience grasp the content and whets their interest in paying full attention to everything we have to say.

Furthermore, most people have a very short attention span, and a limited amount of time to give, whether it be listening to a presentation or reading a written document. It therefore behooves us to develop the practice of getting key points across with a minimal number of spoken or written words. If the presentation or document is meant to be short, these words are the only ones we need to express. Otherwise, these minimal words should serve as the summary, leading to a more detailed explanation.

Example: Conference speeches

Have you ever noticed that when a speaker begins to talk at a conference session, everyone in the audience seems to pay close attention, but after a few minutes, although the audience is still looking at the speaker, their attention begins to wane? If you're listening to a good speaker, you'll see that he or she mitigates this drift by trying to make key points in those first few minutes.

Dr. Z is a highly regarded scholar and a member of the National Academy of Engineering. I've attended three seminars that he also happened to attend. During each one, he behaved the same way—he paid close attention to the speaker during the first few minutes, closed his eyes, and then opened them again during the Q&A period at the end to ask a pointed question. Seemingly, he always deduced his questions from what the speaker said during those first few minutes.

Example: Newspaper articles

A common example of mastering the onset is something we see almost every day in a typical newspaper article. A well-written one begins with a headline and follows with a paragraph summarizing the whole story. After reading the headline, the reader decides whether to continue on to the article. If the headline is enticing, the reader continues to read the article. After reading the first paragraph, the reader then decides whether to read any further for more details. Sometimes, the headline or even the first paragraph is deliberately written in a way to entice readers to read further.

Example: Emails

The writing style for a good news article can serve as a good model for emails.

In writing an email, the subject line is similar to the headline of a news article, and the first couple of lines are similar to the first paragraph.

The chancellor of a major university once told me that he receives tons of emails every day. He determines whether to read the full message in two steps: first, he judges the content in the subject line; then, if the subject line entices him to read further, he usually decides whether to read the entire email by what's contained in the first three lines.

RULE 3: Using three diagrams to simplify complexity

Use diagrams to explain complicated problems, but try to limit them to no more than three.

If a picture is worth a thousand words, then a diagram can be worth ten thousand. This is particularly true for complicated projects and systems. The trick isn't how to represent them with diagrams but how to represent them with only a very few of them—a few can add clarification, but too many would cause confusion. Regardless of a project's complexity, we can usually summarize it in no more than three diagrams. This task isn't easy, but it's important to provide a good conceptual overview as a tool to explain or market an idea to others, as well as to keep ourselves focused. In my own experience, as well as in my observations, this approach has resulted in big payoffs for those who can use it deftly.

EXAMPLE: Three diagrams to explain the subprime mortgage financial crisis

At the height of the subprime mortgage financial crisis in 2009, Frost & Sullivan, a financial and management consulting firm, gave a presentation to its clients about the global economic outlook, entitled "Global Economic Outlook: Bottoming Out Now, Recovery by June 2009."

The presentation used three diagrams to explain how the subprime mortgage problem led to the recession and financial crisis (www.frost.com/prod/servlet/cpo/154869931.pdf):

- One explained how subprime mortgage default problems led to the US economic slowdown.
- The second explained how this slowdown led to the international financial crisis.
- The third explained how the fear caused by the financial crisis led to recession.

I had read several long articles explaining how the subprime mortgage problem led to the financial crisis, but they still left me confused. These three diagrams gave a much better explanation than any of those long articles.

EXAMPLE: Three diagrams to impress a job interviewer

In 1993, when I was offered an interview for the political appointee position of Deputy Assistant Secretary for Information Systems at the US Treasury Department, I considered it to be a long shot. I knew I had to do something to distinguish myself, so I used the three-diagram paradigm.

A friend who was a vice president at a company doing a substantial amount of IT work with the Treasury Department lent me several documents describing its information systems. From these documents, I created three diagrams:

- One depicting how the communication system links the 14 bureaus that form part of the Treasury Department

- One depicting how the new technology may impact the communication system
- One depicting how the 14 bureaus may leverage each other.

Apparently, these three diagrams impressed the Assistant Secretary for Management, who interviewed me; they also gave him a better understanding of the Treasury Department's systems' current state and a vision of future growth. The Assistant Secretary offered me the job. While there were other factors that led him to make the decision, I believe the three diagrams helped a great deal.

Example: Three diagrams to make a successful presentation to Congress

This is about how the IRS was able to use three diagrams to make the US Congress understand its multibillion-dollar revamp project of its IT systems.

In the mid-1990s, the IRS needed to undergo a multibillion-dollar upgrade of its IT systems. With such a large expenditure, Congress held regular hearings to monitor progress and to make sure the project was sound and the money wisely spent.

Such hearings typically began with testimony in the morning by the Government Accountability Office (GAO), followed by an IRS response in the afternoon. Although many of the GAO's criticisms were valid, some weren't. The main problem was that the IRS hadn't been able to articulate a convincing counterargument because it couldn't effectively explain what it was doing. The IRS would then get a beating down from Congress.

Shortly after a new Chief Information Officer took office at the Treasury Department (CIOT), with the responsibility of overseeing IT operations at the IRS, he began to look for why the IRS always got beatings at these hearings. Every time when he asked for a presentation on the IT revamp situation, the staff would arrive in groups of 5 to 10 and bring with them several volumes of documents. Of course, the CIOT could not comprehend what was going on with such large, voluminous, piles of information.

In desperation, the CIOT told the IRS staff he needed three diagrams:

- The first to depict the current system
- The second to depict the final system
- The third to depict the transition paths.

This was not an easy task, but after 10 months, the IRS was finally able to summarize its plan in three diagrams.

The timing was opportune: shortly thereafter, Congress called for a hearing. Just like in the past, the GAO made its critical comments in the morning. Before the IRS began its response, many observers expected the customary beating, but this time it didn't happen. The IRS was able to use the three diagrams to make Congress understand what it was doing and therefore deflected some of the GAO's criticism. For the first time, the IRS did not get a beating down at a Congressional hearing over its IT revamp project.

RULE 4: Sizing up and resonating with the audience

Assess the audience's background and interests, and fashion a presentation to resonate with the audience.

When we give a presentation, be it oral or written, we want to size up our prospective audience's background and figure out their interests. We can then use words, expressions, and lingo befitting our listeners, to make them feel we are conversing with them, not talking down to them. We can then mold the content of our presentation and hopefully induce a "that's right!" reaction from the audience.

For 30 years, "A Few Minutes with Andy Rooney" was a popular commentary made at the end of every *60 Minutes* episode on CBS. Rooney explained the popularity of his commentary in the following way: "I obviously have a knack for getting on paper what a lot of people have thought and didn't realize they thought. And they say, 'Hey, yeah!' And they like that." In other words, Andy Rooney knew how to size up his audience's interests and resonate with them.

It sounds obvious, but different audiences may resonate differently. We must tweak our presentation for different people.

Famed fashion columnist Diana Vreeland once said, "Pink is the navy blue in India." What she meant was that while blue is the most popular color in the United States, pink is the most popular color in India. The implication is that what may resonate with one group may not with another, and we have to adjust our perception accordingly in order to resonate with both.

Our elected political leaders are especially skillful at this—watch carefully what they say to different audiences, or in front of, say, their rural constituents versus their Washington, DC, colleagues.

Sometimes, we may have thought we sized up the audience correctly, but we could not get the resonance we hoped for. If we observe that their reaction to our presentation was a bland response, we may need to retune our presentation.

EXAMPLE: A tale of two gurus: one resonated with his audience, one did not

Two technical gurus worked at the same outfit. One failed. One succeeded. The failed guru tended to talk to his audience at his own technical level while the successful one made an effort to talk to the audience at the audience's level and to resonate with them.

Andy and Bob both have PhD degrees in computer science. Both are highly competent in IT. Both worked in the same IT group where their expertise stood out, and they frequently needed to make technical presentations to their colleagues. Before they joined this IT group, Andy used to work for a research organization where many staff held PhDs and had strong technical expertise, whereas Bob used to work for an engineering firm where few staff members held PhDs. Possibly due to this difference in background, they had different styles in making presentations.

When Andy presented a talk to his colleagues, he liked to use jargon and high-level technical terms. Bob was exactly the opposite: he tried to explain his presentations using words the audience could understand, thereby, making it easier to resonate with them. The colleagues really liked Bob, but were indifferent to Andy.

It goes without saying which one has been more successful in his career.

Example: A tale of two CIOs: one resonated with senior executives, one did not

A successful CIO should be able to use words his senior management can understand and slant discussions of issues to his senior management's interest.

Among the responsibilities that a newly appointed senior vice president (SVP) at a large organization assumed was supervising the CIO. The SVP didn't have any prior IT background and had difficulty following what the CIO and his operation had been doing. The only thing he knew was that the CIO and his group were responsible for the organization's computer and communication systems. He had no rapport with the CIO.

Several months later, he had an opportunity to hire a new CIO. Shortly after this, the SVP began to appreciate the mission importance of what the CIO's group was doing and became a strong advocate of the CIO's operation.

The difference between the old CIO and the new one was that the new CIO was more *sensitive* that his audience—namely, the SVP—wasn't technically oriented. So he spoke to the SVP in words that he could understand and used examples that matched the SVP's interests. The new CIO did have an advantage over the old one: he had been a consultant, and as such, he was accustomed to learning about his clients' interests and orienting his talk with expressions that his clients could understand.

Example: A tale of two cultures: one responded to a humorous analogy, one did not

The same comment drew totally different responses from two different cultures.

During some of Jason's technical talks, he needed to use certain results obtained from highly mathematical "queuing theory" analysis to explain a communication network phenomenon. These results are valid only under the condition called a "Poisson arrival process," a situation in which users arrive at a server (switches, transmission lines, bank tellers, and so on) "independent" of each other. To liven up his talks, Jason frequently explained that in spite of its imposing terminology, this pattern is quite common in real life, with the only exception being the lady's restroom. Ladies seemingly go to the lady's room in groups of two or three, so the "independence" assumption is no longer valid. This analogy usually breaks the ice and earns quite a few laughs, particularly from those who have never heard of the term "Poisson arrival process" before.

When Jason was on a technical exchange tour to China, he made the same joke, but it drew dead silence. Afterward, he asked someone in the audience why this was so. The answer: it was considered uncouth to use the term "lady's room" in an academic talk! The lesson, of course, is that people with different cultural backgrounds or working environment might respond (or resonate) differently to what we say, which we need to keep in mind when making presentations or engaging in conversations.

EXAMPLE: A tale of two readers resonating differently with the same book

Motivational books that combine well-known principles with good storytelling resonate extremely well in most readers' minds. A good example is the best-selling book by Malcolm Gladwell, *Outliers: The Story of Success* (Little, Brown, and Company, 2008). The book's core principle conveys a very well-known concept: your success depends on intelligence, effort, passion, and luck.

Interestingly, the book resonated with two of my friends quite differently. From what they said about it, you would never guess they were talking about the same book.

The first person, Winston, is a fairly successful senior engineering manager. What he got from the book is that your passion for what you do determines your level of success. The book portrays Bill Joy, a founder of Sun Microsystems, as totally immersed in and enthralled by what he does in the computer lab. Winston infers that people like Bill Joy can achieve what they have because they have an inherent passion, not just because they are smart or logged long hours at work.

The second person, Luke, is an average engineer; for him, the luck aspect (timing and environment) resonated more than passion, so he focused on the examples of people like Bill Gates and Steve Jobs; while talented and hardworking, they couldn't have been so successful without being in the right place at the right time.

The reason the two resonated differently is understandable. Winston is quite successful. Subconsciously, he wants to think his success is due to his intelligence and effort, not as much on luck. He readily admits that he does not have Bill Joy's passion, nor does he want to lead a life like Bill Joy's. But that is his personal choice, not luck. To him, intelligence and effort is far above luck. Luke, on the other hand, has not been as successful as Winston. Subconsciously, he wants to think his lack of success is not due to his lack of intelligence or effort, but his lack of luck. To him, luck is above everything.

RULE 5: Being careful of careless comments

Be mindful of what we say. Carelessly worded comments can lead to negative reactions.

After a big win in Florida's primary in January 2012, Mitt Romney was apparently very happy and confident. Early the next day, he candidly spoke to a reporter, saying, "I'm not concerned about the very poor. We have a safety net there. If it needs repair, I'll fix it." In no time, his rivals took the statement, "I'm not concerned about the very poor" out of context and piled criticism on him. Clearly, he didn't deliberately throw red meat to his rivals or aim to alienate voters, but that's exactly what happened.

Most unguarded comments are harmless. But when one of them does stir up negative feelings, the backfire can be serious. Unguarded remarks can inadvertently rub people the wrong way; stir up a strong negative reaction, and may cause severe damage to our objectives.

Gratuitous comments often follow overconfidence. Being wary of overconfidence can reduce the occurrence of gratuitous comments.

I know of several very smart people who could have had more successful careers if not for their propensity for uttering insensitive, often offensive, comments. (An example is given below.) I am also aware of individuals who failed their job interviews due to careless gratuitous remarks. (Examples appear in Chapter 7, Job-Interview Smart.)

EXAMPLE: Insensitive comments blunted career advancement

Dan was a very smart and knowledgeable computer scientist. He had been working successfully as a senior technical staff at a think-tank when the director of an engineering division from another company recruited him. (In practice, a think-tank is an expert consulting firm.) Dan's new position was still as senior technical staff, reporting to a second-level manger. But the director promised Dan that he would be made a division fellow if he worked out after a certain period of time.

Dan worked well with on all his technical assignments. Unfortunately, he had one problem: he liked to make gratuitous comments about the difficulties of technical problems, saying words like, "It's so simple," "It's easy to understand," and so on. When Dan was working at the think-tank, he might have to show off to his clients that he was knowledgeable and was capable of solving any problem. But when he acted this way with colleague in the engineering division, he appeared to be arrogant and belittling. As a result, he was not very popular. Dan's manager described the situation to the division director. Consequently, the director decided not to make Dan the division fellow.

I cannot believe he deliberately said things to upset others. He was just being careless in choosing his words.

EXAMPLE: A careless remark resulted in a lasting negative impact

By any account, General Alexander Haig was a high achiever. Unfortunately, he's most remembered not for his achievements but for an unguarded statement.

In the military, Haig was made a four-star general in his 40s and rose to become the supreme commander of NATO. In the civil service, he was chief of staff at the White House, and eventually secretary of state. In industry, he was CEO of United Technology.

On March 31, 1981, President Reagan was rushed to the hospital from a bullet wound inflicted in a failed assassination attempt. Shortly after, Haig, then the secretary of state, called a press conference at the White House. He made the following unguarded statement: "As of now, I am in control here in the White House." His intention might very well have been to communicate that all was well. But, whatever his real intention, many people viewed this statement quite negatively. On the surface, at least, it implied he had taken over control from the president when he should have stated that the proper chain of command was still in place, or that President Reagan himself was still in control and all was well.

He never lived it down. As a political figure, he was a damaged good. A little more than a year later, he resigned and never took up another government position. He tried to run for president but couldn't get his party's nomination.

One has to wonder whether his statement had any anything to do with his failure to win the nomination. Could history have been different had he not made that unguarded statement?

RULE 6: Using plain language

Use words and expressions that our intended audience can readily understand.

Anyone who has seen the movie Margin Call is likely to have come away remembering the expression, "Explain it to me in English." The movie is a story about a fictionalized Lehman Brothers-type stock brokerage firm. A financial analyst, using a mathematical model, suddenly realizes that the company is in imminent danger of collapse. He has to explain this to his first-level manager, to his second-level manger, and all the way up to the CEO. At the beginning of each of these meetings, he is told right away to "say it to me in English." The CEO even asks the analyst to explain it as though he were talking to a child.

A large corporation hired a new COO (chief operations officer) from outside the company. Upon his arrival, he called a meeting for all the divisions to brief him on their activities. The first presenter began this presentation with an acronym that was well known within the company but not to the new COO. The COO asked the presenter to expand the acronym, which he did. As the presenter resumed his presentation, subconsciously he threw in a couple of additional acronyms. At this point, the COO abruptly stopped the presenter and said, "That is enough for today." He then asked the next presenter to continue the briefing. From then on, every presenter was careful not to use acronyms, but for the first presenter, the damage was already done.

The lesson is clear. Only use words and expressions that are commensurate to our audience's background. Avoid using jargon, acronyms, and technical terms unless we can be sure that our listeners understand them.

Example: Rising to a senior position at a young age

In 2013, Brian Deese was appointed as Deputy Director of the Office of Management and Budget (OMB) at the age of 34. (OMB is arguably the most powerful agency in the federal government. It controls the budget and oversees the management of all federal agencies.)

It is quite impressive, if not phenomenal, for Deese to rise to such a powerful position at such a young age. He must have been very smart and capable, but there are others as smart and capable among President Obama's assistants. What made Deese such a standout? I believe the answer lies in the following statement, which appeared on Reuters.com on March 4, 2013: "Deese is known within the White House for being able to explain complicated economic policy in layman's terms. He has traveled with Obama on domestic trips as the president pressed for economic policy initiatives." That is, he is skilled in using plain language to explain economic policy to Obama and to stakeholders.

Example: Communicating with management

It is our responsibility to make the boss knowledgeable and to understand what we are doing.

Judy, a first-level manager at an electronics firm, once sought advice from me. She complained that her direct manager didn't understand or appreciate what her group was doing. I asked whether her manager held regular staff meetings, and she responded that he did. I then asked her whether she made presentations during those meetings about her group's activities. When she again replied in the affirmative, I advised her that this miscommunication was actually her fault. She violated two rules of "smart soft skills": "Focusing on self-examination, rather than putting blame on others, when things gone awry" (see Chapter 4, Work Smart), and "Using plain language." It was her responsibility, not her manager's, to make her manager understand what she and her group were doing. She just had to improve her communication skills. I suggested that she should, using plain language, practice explaining to her mother, who had no technical background, what her group was doing. If she could make her mother understand after a 5- to 10-minute presentation, she should be able to make her manager understand as well. A few months later, she called and thanked me for the advice and told me that I was right.

EXAMPLE: Turning plain English to an advantage

I have always used plain English to explain any problem. To me, I have no choice. Coming to the United States as a graduate student at the age of 24, I could hardly speak English. The only way I know how to explain anything is to use simple, plain words. I wish I could speak with flair, but I can't. By luck, this handicap of mine has turned out to be a blessing.

During the period when I was actively engaged in doing consulting work, a client named Sunil introduced me to a new client. Sunil advised me to have my first technical discussion with this potential new client in person, not on the phone. He told me frankly that, on the phone, with my accent, people could not understand me well. But in person, I have been able to use plain English to make people understand complicated technical problems. Apparently, I made some of my clients happy because I could explain technical problems to them using plain words.

During the farewell party at the end of my tenure at the US Department of Treasury, my boss paid me a special compliment, saying that he had always understood my presentations at the weekly staff meeting (he is nontechnical). The implication seemed to be that his other direct reports could not do as well. When one of my direct reports made a similar comment, my boss led a standing ovation. Later, when my boss moved to head another agency, he wanted me to work for him again. (I had to decline, for personal reasons.) Apparently, my way of using simple English to explain things actually helped my career.

RULE 7: Using jokes and self-deprecating humor

Have a sense of humor and humility by poking fun at ourselves and mixing jokes with our presentations. It helps to draw audience attention.

We all know that an interesting presentation needs to be inflected with humor and jokes. This is particularly so if we observe a bland response from our audience. The easiest audience-pleasing jokes are those that poke fun at people by stereotyping them. However, if we make such jokes, listeners may laugh, but they will not necessarily respect us for making fun at someone else's expense. By doing so, we end up lowering our own esteem and offending people we have stereotyped. What we should do instead is make fun of ourselves. By doing so, we not only add humor to our speeches without offending others but also exhibit our own humility. We all have enough weak spots and/or peculiarities to joke about. Take me, for example: an ethnic Chinese, a researcher, a professor, a consultant, a manager, and one who speaks with a strong accent. There is more than enough material for me to poke fun at myself.

In addition to self-deprecating humor, we need to inject other jokes into our speeches as well.

One important point we need to realize is that these jokes by themselves do not add much value, if at all, to our presentations. They become an effective tool to make our presentation more interesting and help draw the audience's attention to what we have to say, only if they can be associated with the subject and contents of presentation.

The benefit of self-deprecation is not limited to making presentations. A modest amount of self-deprecation, when used sparsely in regular conversation, can make us more likable and project an image of being successful and confident. (Being people smart!)

Example: Backfire caused by stereotyping others

A large high-tech company was establishing a new research center for communications. To celebrate, the center organized a workshop and invited many well-known researchers in the field. For the dinner banquet, many senior executives and local dignitaries were invited as well. The "communication" here involves electronics and electromagnetic waves, so the center director thought it would be interesting to have a dinner speaker who is a speech communication expert to talk about "communications" from a totally different perspective. (Note: this is the type of communications this chapter is addressing.)

The speaker, Cassidy, was to give a talk on the subject of miscommunication. As a seasoned speaker, he started with a joke.

The joke belittled two ethnic groups. In particular, he stereotyped ethnic Chinese from old Western movies/TV shows as menial workers, uneducated, and ignorant. While he was successful in bringing out laughter from the audience, one of the two ethnic Chinese in the audience stood up, expressed his displeasure of Cassidy's joke, and walked out. The remaining talk ended in a quite unpleasant mood.

(Lessons learned: (1) Do not make ethnic jokes in public speeches. (2) If we do make them, do not make insulting ones.)

Example: Using self-deprecation to liven up presentations

Injecting into our speeches self-deprecating jokes that can be linked to the subject of the speech is a particularly effective way of making our talks more interesting and enjoyable to the audience.

I stumbled on this self-deprecating technique out of necessity. I face two handicaps when I make a presentation: a typically boring technical topic and a heavy accent. This combination is a sure recipe for boring everybody in the audience, a harsh reality I discovered during my first presentation at a conference. At that time, I knew I had to say something humorous to get the audience's attention. But I was not able to think of any appropriate joke on the spot, except for poking fun at myself. The topic I was presenting concerned communication protocols, so I pointed out that a communication protocol is a set of language rules that have been defined by its creators. Different protocols are created by different people and therefore have different rules. I then related an embarrassing story in which I mixed up a certain protocol in Chinese language with that of English. This self-deprecating joke brought laughs from the audience and livened up my talk. (Author's note: I removed the specific joke from the book under the suggestion of a reviewer. He did not think I should put an ethnic joke in the book.)

EXAMPLE: Taking cues from our political leaders

In his victory speech on Election Day in 2008, US president-elect Barack Obama referred to himself as a "mutt." In her swearing-in speech at the Department of State, Secretary Hilary Clinton thanked her husband for teaching her all kinds of "experiences." During his guest appearance in February 2013 on the *Late Show with David Letterman*, New Jersey Governor Chris Christie poked fun at his weight and called himself the healthiest "fat guy." If our leaders are humble enough to make fun of themselves, we common folks should be able to do likewise.

EXAMPLE: A survey on sense of humor

Accountemps, a large employment agency, conducted a survey of more than 1400 CFOs (chief financial officers) about the question, "How important is an employee's sense of humor in him or her fitting into your company's corporate culture?" Approximately 79% of them said it is important (accountemps.rhi.mediaroom.com/funny-business). In reporting the story on its website on June 2, 2012, MSNBC asked visitors similar questions, and almost 97% of them gave a positive response.

Surely, a person capable of self-deprecating is likely to have a sense of humor. So we should be sure to add self-deprecating humor and humility, as well as other humor, to our speech or conversation. After all, it is simply being people smart!

1 Why Every Leader and Manager Should Be a Great Coach

Fulfillment is a right and not a privilege. Every single one of us is entitled to feel fulfilled by the work we do, to wake up feeling inspired to go to work, to feel safe when we're there and to return home with a sense that we contributed to something larger than ourselves.

—Simon Sinek, British American author, keynote speaker, and organizational consultant

What's the difference between a good leader and a great leader?

All leaders are expected to improve performance and achieve great business results. Some leaders are lucky and succeed in spite of themselves. Some get mediocre results. Others succeed in the short term but in ways that don't build trust or sustain results.

I submit that the difference between good and great leaders is the ability to coach and develop people.

Damon was a vice president of operations within his organization, a firm plagued by low levels of trust. He knew that to move forward in this firm, he should make a serious effort to build trust with his boss and colleagues. I was asked to coach him.

But I found that Damon was unwilling to put in the work to actualize that goal. He was disorganized, an inefficient planner, and poor at prioritizing tasks. Though he worked very hard and was quite brilliant, he was also a chronic micromanager and often got lost in the weeds, taking his team with him. Essentially, Damon "got a lot done," but he was a horrible leader. He failed to define a clear strategy, set focused goals, and empower and engage his team around those goals.

Furthermore, Damon was less a leader than a cop. A favorite pastime was to catch his team members doing things wrong—"gotcha!"

games. He tried to make up for his lack of performance by blaming his team. When the time came for Damon's boss to move on, he naturally expected to get the open job. Neither his peers nor his team trusted him to do the job that needed to be done, so it went to someone else.

"Quit and Leave" or "Quit and Stay" Syndrome

There might have been a time when aggressive behaviors paid off for leaders like Damon, but that time is about over. Faced with untrustworthy managers, employees take one of two actions: they quit and leave or they quit and stay.

We all know what it means to quit and leave, but what does it look like to "quit and stay"?

Consider Scott Adams, who created the cartoon *Dilbert*. Adams began cartooning while he was working at an unmotivating job for managers who were utterly uninterested in him. How could he do a full-time job and still produce his famous workplace cartoons? He basically quit and stayed. He explained it himself: "The day you realize that your efforts and rewards are not related, it really frees up your calendar. . . . I had time for hobbies." His day job gave him plenty of practical and fun material to work with.

Leaders who try to drive, insult, or micromanage people will end up with team members who quit and leave or quit and stay. It's a natural consequence. The inevitable result is mediocre business performance or worse.

Coaching—the right kind of coaching—is the antidote to poor leadership.

Coaching by Definition

If you want to lead, not drive or micromanage, you need to become a coach!

According to the International Coach Federation, the body that sets standards for professional coaching worldwide, coaching is "a partnership that is formed to inspire others to maximize their personal and professional potential."

That's powerful. It means that a leader-coach honors team members as experts on their own lives. "The person who is currently doing a job is in the best position to know how to do it better," Dr. Ben Nelson observes. Coaches honor this expertise. They believe in the team and the employee. They know that the people they lead are creative, resourceful, and whole. They take responsibility to discover, clarify, and align each person's goals with the goals of the organization, producing a "win" for everyone. Coaching is the practice of getting people from where they are now to where they really want to be.

How does coaching work? Coaches listen, observe, and adjust their influence based on the needs, talents, and strengths of the team and the individual employee. By asking powerful coaching questions, the coach elicits solutions and strategies directly from the employee to help achieve the aims of the organization as well as those of the individual. Thus, coaching is also the art of building an effective culture and work environment.

Obviously, coaching executives and coaching athletes are alike in some ways, and the two kinds of coaches can learn from each other. One of the greatest coaches I have ever had, whether in a sports or corporate arena, was my sophomore high school basketball coach, Ron Burnside.

Coach Burnside was a short guard with a peculiar appearance and a distinct, high-pitched speaking voice. But he knew people, cared about his players, and had a strong commitment to coaching. He built into 16 boys a team mindset so we learned to care about each other, play for each other, and play to win. He understood purpose, vision, values, and high-performance expectations. He coached from the bottom up—through fundamentals and hard work to skill development. Although he was known for his challenging practice sessions, he kept things fun and entertaining. We knew he cared about each one of us as individuals first and players second. He showed trust and respect with each of us.

Under Coach Burnside's leadership, our team won 16 of 20 games, beating teams with far superior athletic talent and size. We did this because our coach believed in us as individuals, challenged us to be our best as a team, and set high expectations in our practices and game performance. He would often say, "You will play in games the same way you play in practice."

So you've never been a "coach" before? It doesn't matter. Coach Burnside was young. He had played college basketball but had very little coaching experience. As I've reflected over the years why Coach

Burnside was such an inspiring and motivating coach, these qualities come to mind:

- He inspired us with a clear vision, purpose, and values.
- He put each of us in positions to play to our unique gifts, strengths, and talents. We were very clear on our individual roles, but we were trusted and empowered to shoot the ball when open.
- He was demanding but never demeaning, disrespectful, or abusive. He treated all of us with respect, honesty, and loyalty.
- He understood how to build both a player's skills and basketball IQ and knew how to unleash the potential in each of his players.
- He demanded that each player achieve personal mastery though hard work and discipline.
- He communicated very well and connected personally with each player.
- He helped us form great relationships and build our confidence in each other.
- He put in the time needed to prepare his players well for every game.
- We had fun!

Coach Burnside took us from being young, immature kids to being confident, focused, and skilled champions.

Can you re-create that in your life and in your business? Can you create a great team by discovering individual strengths and potential, communicating effectively, actively forming relationships of trust, and putting in the time necessary to help develop the talents, skills, and capabilities of those around you?

If you cannot say, "Yes!" to this now, you will be able to by the end of this book. You'll be prepared to lead and effectively influence others around you. Fortunately, if you're amazing to work with and for, the consequence is natural: people will stay and give you their best work. You will retain and fully engage your talent, you will build up new leaders, and you will continue to grow in your career and in life.

Unfortunately, in too many organizations, the exact opposite is happening.

A business executive told me recently that in the next five years, 65% of his employees not only *could* but *would* retire. The statistics were devastating to him. "Michael," he explained, "I don't have anyone in-house to replace them. We have not developed the next generation of talented leaders that are prepared to take over. We have a huge talent gap!"

This executive is not alone. All too often, organizations are unprepared with their leadership and talent pipeline. This lack of preparation poses a real strategic threat to any team or organization. What's the solution? Coaching and development of your people. Coaches understand what is important for customers and the business. They understand how each business unit and team supports a shared leadership responsibility for vision, strategy, goal execution, and delegation. They also understand what is involved for employees to grow their skills; increase their decision-making; expand their roles and responsibilities; and increase their motivation, productivity, and engagement.

Your top talent, and often your middle talent, will have multiple career choices and options outside of your organization. Some may feel like their job is a dead end. Others will have a bad relationship with the boss or other team members. Others find no significant purpose or excitement in their current roles.

That's why it's urgent that you become the kind of coach I've defined here: a true partner who inspires others to maximize their personal and professional potential.

Coaching: What It Is and What It Isn't

> *Coaching is unlocking a person's potential to maximize their own performance. It's helping them to learn rather than teaching them.*
>
> *—Sir John Whitmore, founder of GROW Coaching Model and co-founder of Performance Consultants International*

I've known many leaders who tried to become trained as coaches but found their training didn't work. It was too simplistic, boring, overly theoretical, not practical, or too academic. Others felt their coach training was from a different planet, taking them on a New Age–filled psychological journey loaded with mystical lingo with no relation to reality.

In contrast, the coaching skills and tools in this book are practical and easy to use. They are based on years of testing, trial, and practice. My purpose is not to bore or mystify you, but to help you understand the basic elements of how to become a great coach.

Coaching is not consulting or counseling. This is a surprise to many people who do not understand the foundations of coaching. A coach does not walk in, tell you how to succeed, and solve your problems for you. Neither does a coach probe your childhood traumas while you lie on a soft couch in a dark room.

A real coach:

- Takes a collaborative and supportive approach by partnering with others
- Asks powerful and provocative open-ended questions at the right time, in the right way
- Focuses on the client's agenda and what is most important to them
- Focuses more on solutions and opportunities than on past problems
- Helps identify and overcome obstacles to success
- Shows courage by asking honest questions *and* consideration by showing respect
- Helps clarify a client's vision, strategies, goals, and objectives
- Helps clients improve their mindsets, behaviors, and ability to change
- Encourages clients to make their own informed choices
- Holds clients accountable for their choices

A real coach does not:

- Provide consulting services, which usually entails giving expert advice
- Provide counseling or therapy
- Hold open-ended conversations that go nowhere
- Figure out why people are broken and what needs to be "fixed"
- Tell people what to do and how to do it

Now I hope you realize that you don't have to be a pro at counseling or consulting to be a great coach.

Coaching Can Be a Game Changer!

> *Never doubt that a small group of thoughtful, committed citizens can change the world. Indeed, it is the only thing that ever has.*
>
> *—Margaret Mead, American cultural anthropologist*

Everyone has the potential to be a great leader and coach. Within every human soul is the capacity to develop natural gifts, talent, and strengths. It starts with focusing less on self and more on building, developing, and empowering people around us.

My first introduction to professional executive coaching occurred back in the 1990s when I was working for PricewaterhouseCoopers as a management consultant. I saw a coaching course advertised at the University of Maryland, and I was instantly intrigued. The title was "The Art and Practice of Coaching Leaders."

Coaching leaders. Not athletes. Not All-Americans, but leaders in a business context. I went to the course, and as I sat there, I was instantly hooked. I saw at once that coaching in the workplace could become a critical part of an effective leader's toolbox.

After that, I knew I could walk into my family room, my favorite automobile repair shop, or the corner executive office of a Fortune 500 company as a coach. I knew I could bring about a significant, productive change in thinking no matter where, no matter with whom.

Since then, research data show my instincts were good. According to a study published in *The Manchester Review*, the right kind of coaching can improve productivity by 53%, quality of work by 48%, working relationships by 71%, teamwork by 67%, and job satisfaction by 61%.

I strongly believe that everyone can be a great coach and that coaching is needed everywhere. In fact, I've built an entire business around the belief that coaches are not born: coaches can be developed. All it takes is learning a few new skills and turning those skills into a natural competency.

This is my coaching promise: as you read this book and put these tools to work, you will increase your skills and capabilities as a coach. You will gain the ability and confidence to better engage and unleash the passion and talent of your team toward their highest goals and priorities.

An Example of a Highly Effective Coach

Early in my career, I had a leader who was great because he was a highly effective coach. His name is Stephen M.R. Covey, the son of Dr. Stephen R. Covey. Over the three years he led and managed me and our consulting team of 20 people, I came to recognize that he had strong business acumen. He worked at understanding our customers, the industry, and the market. He was sound in his judgment and in strategic thinking. He was a very competent business person.

But his true greatness as a leader was in his highly effective coaching. He was highly emotionally intelligent.

Stephen M.R. had ongoing coaching conversations with me about my job performance, my future, my learning and development, and even my personal and family goals. His coaching was both personal and professional. He knew me, cared about me, and brought out the best in me. He evaluated my performance against a "win-win agreement"—a plan by which both the firm and I would benefit in concrete ways.

Instead of handing out directives, Stephen M.R. asked questions. He empathically listened to the answers—from customers and from his own people. He sought our input and feedback and validated our views. He took a deep interest in us, treating us as whole-people and not just cogs in an organizational machine. He recognized and rewarded our contributions. I was impressed by how open he was and how much he trusted everyone on our team.

Stephen M.R.'s coaching was open, honest, humble, positive, and focused on solutions. He was interested in *our* success, not in finding fault, judging, blaming, or shaming. He was fully invested in the art of coaching others to become successful leaders themselves.

I firmly believe every leader can be a great coach, like Stephen M.R. Covey. That's why I've written this book. In my view, coaching is the central skillset of a great leader. As you read this book, consider the many, many leadership challenges that can be solved through great coaching. Here are just a few such challenges to ponder:

- Do team members buy in to the organizational strategy? How can you help them get aligned with organizational and team goals?
- Are team members fully aware of the performance standards they are expected to meet?
- Do they get effective feedback? Do they know what needs to be improved and by when?
- Do they have "skill issues" or "will issues"?
- Do they know what their strengths are and how to consistently leverage their gifts and talents?
- Do they have clear action plans with defined accountability and support?
- When they fall short, are they dealing with issues within or beyond their control?
- What training, resources, or mentoring do they need to improve their performance?

- What options do they have for overcoming obstacles?
- Are you clearing the path for them so they can overcome obstacles outside of their control?
- Do they know what the consequences are for falling short of goals?
- What kind of recognition and reward do they really need when they succeed?

As you contemplate these challenges, ask yourself what kind of skills you need as a leader to help your team meet them. I guarantee that the most effective skillset you need right now is the skillset of an effective coach. In this book, you will learn how to:

- Hold effective coaching conversations—whether long or short, planned or in the moment
- Listen empathically
- Influence the mindset of your team members through questioning rather than dictating
- Help clarify strategic direction, goals, and objectives
- Discover and use each team member's natural gifts and strengths
- Offer feedback that is helpful rather than hurtful
- Help members develop personal awareness and devise their own plans for improvement

Now see yourself as a great coach. You'll have a team that is crystal clear on strategic direction and clear performance goals. You'll elicit the best from your team by asking good questions and exhibiting great listening skills with empathic accuracy. You'll create a high-trust culture by treating people as partners and capable assets rather than underlings. You'll identify the unique skills, strengths, and talents of your team members. You'll position people in the right roles. When confronted with weak performance, you'll give honest, respectful feedback that will strengthen people rather than tear them down. And you'll be affirming and supportive, and celebrate their achievements along with them.

That is the promise of this book. Now let's get started.

1

ENABLING PRODUCTIVE FLOW

While some of our work is done alone, most of it involves working with others. When we work with others we *cooperate*, working together to achieve shared results. We commonly do this in the context of communications, meetings and projects, although we may cooperate in many other ad-hoc ways.

Our challenge is the unproductive friction we create for others when we cooperate, and of course the friction they create for us.

A good friend of mine is an experienced sailor who has competed in gruelling events such as the Sydney to Hobart Yacht Race. He knows how to make a boat go fast, and he knows what slows a boat down.

He once told me a story of how a bucket attached to a rope fell overboard during a race, causing a sudden and almost immediate drag on the boat. Now, everyone on board that racing yacht would have known the drastic impact such an accident would have on their speed, and they wasted no time in cutting it loose.

Matt went on to tell me of a more insidious form of drag when sailing: the build-up of barnacles on a boat's hull produces an uneven surface that creates friction as the hull cuts through the water. In a race this kind of drag, being more gradual, can go unnoticed until it is too late. This is why some boat owners, especially of racing yachts, can spend thousands each year having their hulls cleaned, particularly before a race.

In the modern workplace, we face similar challenges. Sometimes someone will do something that completely disrupts our productivity. For instance, our priorities and schedule for the whole day may be upended because another department needs an issue resolved urgently.

It is as though a bucket were dropped behind our boat, causing a drag that slows us down instantly.

But sometimes our productivity is disrupted in a more insidious way by a daily build-up of little things that affect our ability to work. These disruptions turn our work flow into work friction.

Few people set out to cause friction. Some might have little regard for other people's time, but most of us do our best to get our work done, and the friction we cause is simply the collateral damage of our busyness. This friction is a major productivity drain, however, and when compounded across the team, quickly adds up.

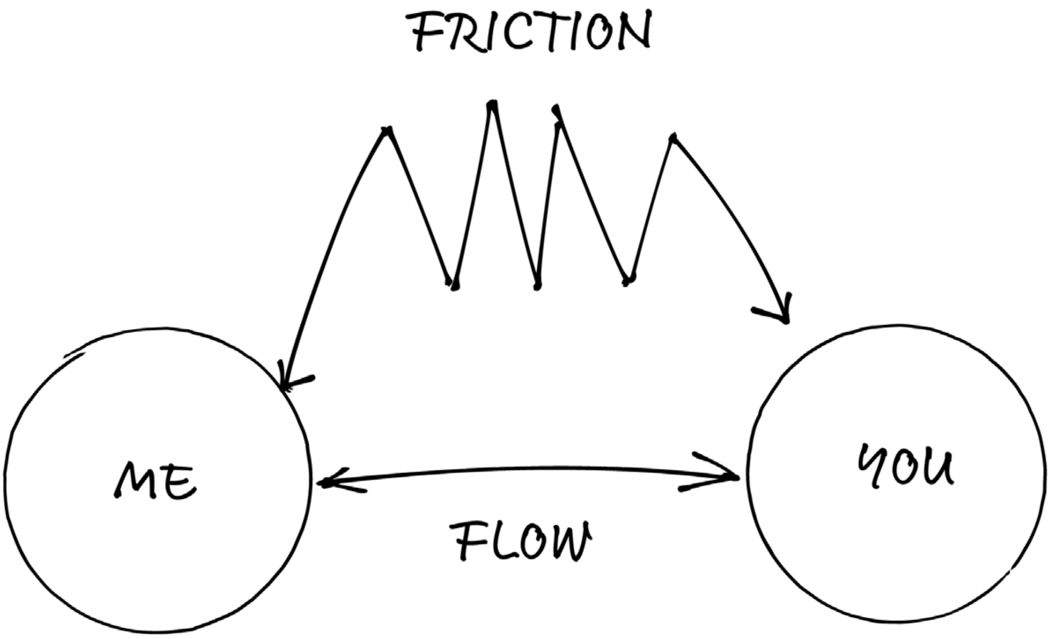
Productivity friction

So what does friction look like? And how can we turn it into flow?

Friction is the loss of productivity and effectiveness that occurs in the 'gap' between two people, as illustrated in figure 1.1. It is that brief loss of focus when we are distracted by an interruption. It is the wasted time spent in a meeting that has no agenda and no real focus. It is the frustration we feel when an urgent request derails our day and the priorities we had planned. It is the sense of overwhelm we feel every time we open our inbox to find hundreds of new messages waiting for our attention.

None of these issues are major problems in themselves, but over days and weeks they add up to create a friction that makes our work harder than it needs to be.

Figure 1.1: friction versus flow



FRICTION: Negatively affecting the productivity of others through lack of awareness or lack of care.

FLOW: Consciously working to enhance our own productivity as well as the productivity of those around us.

Poor productivity behaviours

In a team where friction rules, you will find the following behaviours affecting the productivity of all concerned:

Meetings

- Participants turn up late to meetings.
- Participants arrive unprepared.
- The wrong people are invited.
- They fail to follow through on agreed actions.
- Meetings are called at short notice.
- Meeting agendas and outcomes are fuzzy.

Emails

- We send too many emails.
- Our communications are not expressed clearly.
- The desired actions are buried in the body.
- We copy people into the email unnecessarily.
- We write fuzzy subject lines.
- Every email is marked 'urgent'.

Delegation

- We choose the wrong people for the job.
- We delegate at the last minute.
- We don't take the time to delegate well.
- We delegate all responsibility but no power.
- We micromanage the delegation.
- We don't provide enough support when needed.

Interruptions

- We make too many interruptions.
- We show a lack of awareness and empathy.
- We interrupt just because we have a thought.
- We make negotiation hard for the other person.
- We make every interruption an urgent issue.

Deadlines

- We leave work tasks until the last minute.
- We create unnecessary urgency.
- We expect instant responses.
- We forget or fail to meet deadlines.

All of these examples of poor productivity behaviour cause friction, not just between two individuals, but across the team.

If we do not manage it, friction will pile on top of friction. What if we could reduce the friction that occurs when we work with others? We probably cannot totally eradicate it, but if we reduced it just a little in every interaction, and we did this across our whole team, the productivity gain would be huge.

In his book *Will It Make the Boat Go Faster?,* British rower Ben Hunt-Davis talks about 'the aggregation of marginal gains', a concept he learned from the British Cycling performance director David Brailsford. This idea suggests that 1 per cent improvements in different areas such as training, diet and aerodynamics would aggregate to a massive overall performance improvement.

If we were to reduce the productivity friction in many areas of our work, such as our emails, our meetings and our project collaborations, we would enjoy a massive increase in productivity. And if we did this consistently across the team, we would create a more productive culture—a culture where flow was the norm.

Friction vs flow cultures

Running through my son's recent end-of-term report, I noticed he was marked as late on several days over the term. For me this was unacceptable. His response was, 'But Dad, all my friends are late more often than I am!' In my head, I recalled much the same conversation with my own parents, and my reply to my son was very similar to theirs: 'I don't care what your friends do. This is my expectation of you…'

In the workplace, our productivity behaviours cannot be measured against the group norm. Just because most people are late to meetings does not make it okay. We need to measure ourselves against a higher standard, one that is not diminished by group behaviours.

The group norm must not dictate our behaviours. Our behaviours must dictate the group norm.

The culture of a team is partly dictated by the behaviours and habits of the individuals in that team. In a friction culture, poor productivity behaviours across the team cause disruption rather than collaboration. The common feeling is of 'busyness'.

In a flow culture, on the other hand, people don't talk about how busy they are. We are all busy. Move on. They instead talk about how *productive* they are, even if their schedule is full. (When people ask me if I am busy at the moment, I now refuse to say 'yes,' replying instead, 'No, my schedule is productively full.' This is not just about positive spin. It is about mindset.)

Many friction cultures feel like they are always short on resources. There is much talk about how short-staffed we are, how we have too much to do and not enough time, so we can't get *anything* done. Sound familiar?

In flow cultures, we not only use our time more effectively because we are organised, focused and proactive, but we get more done because we are resourceful. We find a way. We work it out. We are in control of getting what is important done on time.

How do we move from a friction culture to a flow culture?

Beyond personal productivity

Increased productivity, especially sustained increased productivity, does not just happen by itself. Productivity must be led by leaders who make it a priority, and who passionately lead by example so their team model their way of working.

For greatest impact and leverage, leaders and managers at all levels in the business should put the productivity of their team on the agenda, and make it a personal priority to support and lead the productivity effort.

Cultures are formed around a set of principles and behaviours that are modelled by everyone, starting with the leadership team. If your work style is reactive, disorganised and chaotic, the culture of your organisation will mirror this.

As a leader, you have an opportunity to boost the productivity of those around you, and to set up your organisation for many years of sustained productivity.

Over the past 15 years I have worked in many organisations, helping individuals and teams to improve their personal productivity. I am passionate about this work but have been frustrated at times by how great training and coaching can be undone by the culture of an organisation.

I believe that this applies especially to productivity training. Individuals come back from a training day fired up, excited about the potential of their new learnings, and ready to change the habits of a lifetime. But for all their efforts to work more proactively, the reactive culture they work in drags them back into firefighter mode, reacting to urgency and putting out fires.

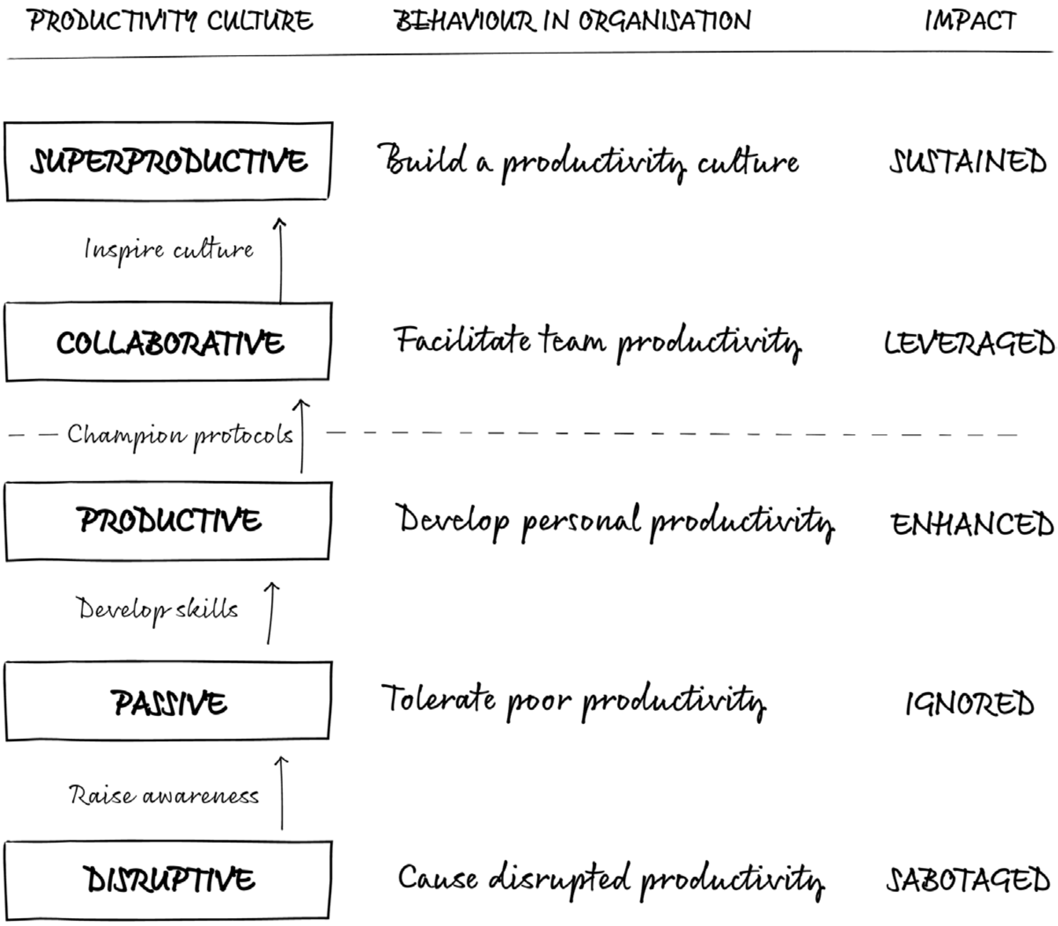
For all their desire to get to the impactful work in their role, their time is squandered dealing with operational issues, often caused by someone else's poor work practices or lack of planning. Even with the best intentions to create space for the important work, their time is taken up with endless meetings and a deluge of emails.

Research by Bain & Company has confirmed how culture can work against the good intentions of workers and teams. One report on large organisations found the problem to be cultural as much as systemic, with the corporate culture tending to siphon resources away from externally focused, customer-serving tasks. The report noted:

> *Most time management advice focuses on individual actions—be choosy with meetings, rein in your email box. But this advice sometimes goes against your company's culture: Ignore emails and meeting invitations and you risk alienating your colleagues—or your boss.*

Figure 1.2 (overleaf) outlines the different productivity cultures that can exist, and what needs to happen for an organisation to move up the ladder from *disruptive* to *superproductive*.

Figure 1.2: from disruptive to superproductive



Level 1: DISRUPTIVE

Many leadership teams talk about the importance of productivity in the organisation, yet the truth is they are sometimes a part of the problem. While they may have the best interests of staff at heart, sometimes the ever-changing environment and the constant pressure to achieve results lead to behaviours that have a negative effect on productivity. This can lead to a reactive culture with fuzzy priorities and little support to help people to work in a productive way.

Everyone works long hours to deal with their massive workload, lurching from one urgent issue to another, drowning in email and back-to-back meetings.

If this is the culture in which we work, we need to raise awareness and set some expectations about how the team could operate to ensure maximum productivity. This is especially critical at the leadership level, as poor productivity behaviours can have a doubly negative effect. If the leadership team's mindset is off, you can expect that their teams will adopt a similar mindset. As the comedian Eddie Murphy used to observe, 'Follow a stupid kid home, and I bet your bottom dollar you will find stupid parents.'

Level 2: PASSIVE

In some organisations, a passive culture predominates. The leadership team may not be causing the productivity issues, but they also may not be doing enough to protect their teams from them. They may ignore the need to work on productivity, and believe they can get by using outdated methods and cobbled-together organising systems.

They may still use obsolete tools to organise themselves, and personally resist the adoption of technology to boost productivity. Perhaps they see the benefit for others but convince themselves that they don't need to change and are operating just fine with the toolkit they have built for themselves over the years.

The key to reaching the next level is to make productivity a priority, and to take steps to upgrade the personal productivity skills of everyone in the team. This is where personal productivity training comes in, and it is this training that makes up much of the work I have done historically with my clients. But, as we will discuss, personal productivity training fixes only part of the productivity problem.

Level 3: PRODUCTIVE

At the productive level, leadership may have invested time and money to develop the skills of the team and achieve enhanced productivity. But here is the real challenge, and the real opportunity. If we stop here, as I believe most organisations do, the productivity gain may be limited, as the efficiencies gained by the individual are offset by the friction caused by our co-workers.

So the next focus needs to be on agreeing on and embracing a set of productivity principles that, when adopted by the team, serve to enhance team productivity. When we operate according to a set of agreed behaviours every time we *communicate*, *congregate* and *collaborate*, our collective productivity cannot help but increase. This reduces friction and increases flow.

Level 4: COLLABORATIVE

For the organisation that goes from productive to collaborative, work will flow, with the effectiveness of the team increasing in a highly leveraged way. The sum is greater than the parts.

But adopting a set of agreed protocols can generate an initial flurry of excitement and action that soon recedes as we fall back into our old habits. They become posters on the wall that we don't even notice anymore. If this happens, the productivity gain at the collaboration level can be short-lived. The final focus on the journey to creating a superproductive organisation requires a long-term change in culture.

We need leaders at all levels to step up and champion this new way of working to achieve sustained productivity. If we stick with it, the culture will change for the better, and over time even new starters will quickly begin to operate productively in their new superproductive workplace.

Level 5: SUPERPRODUCTIVE

Superconductors, like those used in MRI machines, operate at extremely low temperatures and can reduce the energy lost to resistance enormously. In fact, a current in a superconducting circuit can theoretically travel around the circuit for decades without loss of power. The lack of resistance ensures the purity of the energy.

Similarly, a superproductive culture can experience a sustained increase in productivity across the team or organisation, and will ensure the energy of the workers is maximised. Everyone works in a way that is personally productive, but also productive for those around them. And the culture ensures that these mindsets become a part of the DNA of the organisation.

A superproductive organisation not only experiences very high levels of productivity across the team, but ensures this productivity gain is sustained over time, even when members of the team leave and new members join. Superproductive becomes 'the way we work around here'.

Imagine a culture in which everyone is highly skilled at managing their time and priorities.

Imagine a culture in which people actively work to enhance their own productivity as well as the productivity of others.

Imagine a culture in which productivity is embedded in the DNA of the organisation.

So how do we move to this ultimate level of productivity? How do we inspire a culture that will allow productivity to flourish? Let us look at the pathway to reducing friction and enabling productive flow.

1 What Is Critical Thinking?

Thinking is the foundation of everything we do. Every action, every solution, and every decision we make is the result of thinking. We think when we decide what to eat for lunch, how to meet a project schedule, and what to say during a conversation. We think when we drive a car (although, unfortunately, we're not always thinking about driving). We're thinking all the time, and although not always filled with valuable thinking, our brains are always in gear. Even when sleeping, we're thinking.

Critical thinking is thinking but in a different way. Many people describe this process using terms such as *analytical, thoughtful, questioning, probing, nonemotional, organized, innovative, Socratic, logical, methodical, not taking things for granted, examining, details, exhaustive, outside the box, scientific*, and *procedural*. Odds are that you've heard and probably used a few of these terms. But what exactly do they mean?

Some paraphrase critical thinking as "thinking smarter." I paraphrase it as "headscratching." Most would agree critical thinking is not our everyday, automatic, not-really-thinking-about-it thinking.

Critical thinking is:

- manual thinking (not automatic);
- purposeful;
- being aware of the partiality of your thinking;

- a process; and
- thinking that uses a tool set.

Here are the details of each of these:

Critical thinking is manual rather than automatic thinking. Let's first take a look at automatic thinking, the kind of thinking we do the most. Have you ever driven your car to work but didn't remember the drive when you got there? How about intending to stop at the grocery store on the way home from work—then realizing as you approached your home that you completely forgot about that errand? What about a time when you put your keys down and had no idea where they went a few minutes later? This is what happens when you're in automatic thinking mode. It is still thinking, but you're not necessarily *aware* of what you are thinking.

Try reading this text:

> You mghit tnihk i'ts aaminzg taht you can raed tihs with vrlialuty
> no diluftficuy even tuohg the ltetres are mxeid up. It trnus out taht
> all you need are the fsrit and lsat leetrts in the crocert pcale.
> Tihs is an eaxplme of yuor barin rnuning in aoumtatic mdoe.

How can you read that? When I ask that question, the answer I inevitably get these days is "Because I can read my kid's text messages." Well, that's partially true; but really, how are you able to read that? If English is your native language, you probably even read this as quickly as you would have if the letters were not scrambled.

Your brain does several activities to enable you to read this mixed-up text, one of which is pattern recognition. Your brain is a very powerful pattern recognition machine. You've probably had the experience of talking with someone and being able to predict how they are going to react—because it's a pattern. We recognize many things, such as places, people, noises, and smells. As you start reading the paragraph, your brain automatically starts to unscramble the words—until you get to the word *tuohg*. It's spelled wrong. It is missing a letter and doesn't follow the rule. Your brain recognizes this, so it mentally searches every word you know that looks like *tuohg* and might belong in the sentence. This is called context recognition and refers to what belongs here—what fits based on the sentence's meaning. Our brains are incredibly adept at this. As a result, our pattern recognition, aided by context recognition, enables us to read the preceding passage. However, what if I had asked you to pick the misspelled word? Did you even catch that while you were reading? Most people have a difficult time picking out *tuohg*.

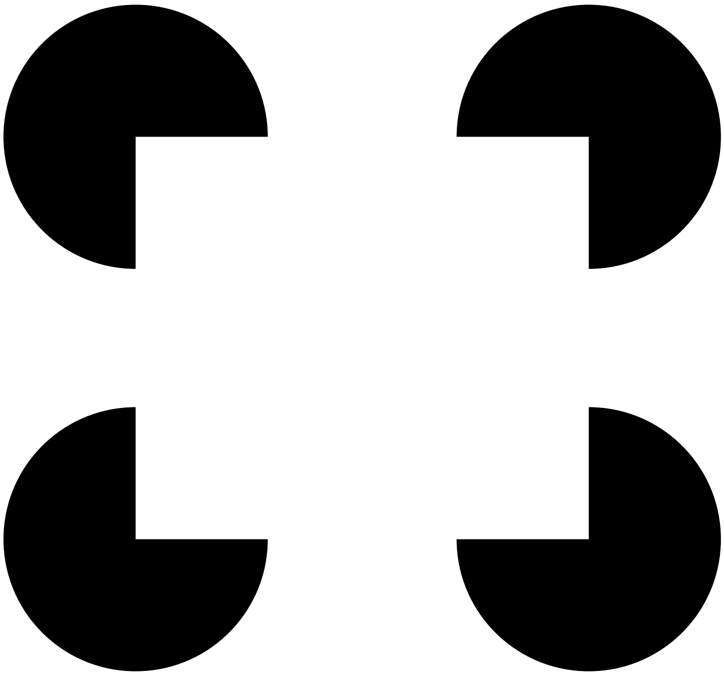
Try this next activity: count the number of Fs in the following paragraph, in 15 seconds or less.

> FINISHED FILES ARE THE RE
> SULT OF YEARS OF SCIENTI
> FIC STUDY COMBINED WITH
> THE EXPERIENCE OF YEARS.

How many Fs did you count? Three? Four? Five? We show this in every workshop we conduct, and usually about two-thirds of the class count three, with the remaining counting four, or five, and only a few counting six. There are six Fs in that paragraph, and if you didn't see them all, you missed one or more instances of *OF*.

The Fs test is an example of how your brain discards information when it's operating in automatic mode. Our minds discard things such as this all the time. You throw out some of what your manager tells you; if you are a manager, you throw out some of what your reports tell you. You disregard things your significant other says to you (and get lectured about it later). Why do we throw stuff out? Our brains are bombarded with a tremendous amount of information. When your eyes are open, billions of information bits per second are entering your brain. Your ears are always open, but you block out noise. In an attempt to simplify things for you, your brain throws things out that it doesn't deem important or thinks it already knows. The trouble is that your brain doesn't tell you it is throwing things out; it just does it. Thank you, automatic mode!

Try one more activity: What predominant shape do you see in the diagram that follows?



The square, right? Of course—but it's not really there. Those three-quarter circles define the boundary, but the square isn't there if you move them away. This is an example of how you make stuff up when you operate in automatic mode; that is, you infer things that are not always true.

Your brain's automatic mode is extremely helpful in guiding your thinking. However, unbeknownst to you, it also discards, distorts, and creates information. Although this tendency can be extremely helpful in many situations—such as your drive to work—it can also be a drawback. When you have to think about something important, you want to get out of automatic mode and go into manual—that is, critical thinking.

Critical thinking is purposeful. You make a conscious effort to leave automatic mode as you start to consider a certain situation. You begin to think a little bit differently using some of the techniques of critical thinking. You are very aware about what you are thinking and are thinking purposefully. For example, when you are learning something for the very first time, you are very attentive; you listen carefully to determine whether you understand; you're aware that your goal is to learn something.

Critical thinking means that you're aware of the partiality of your thinking. Most of the people we ask assume critical thinking is nonemotional thinking. That would be great if humans could actually achieve it. But if you are reading this book, you are undoubtedly a human being—and humans have emotions, biases, and prejudices that stem from our values. Although it is possible to be aware of these, it is impossible to ignore them. Your values are a part of you, and as you will read later, play an important role in how you come to conclusions. You cannot be completely impartial, but you can be *aware* of the components of your partiality and how they influence you.

Critical thinking is a process. This process requires that you understand a situation, come to a conclusion about what to do, and take action on that conclusion. We have many processes in business—the steps we follow to get us from A to B. For example, a customer who has a problem may call customer care. A typical process there might include understanding why the customer is calling, assessing the situation, asking a series of questions, perhaps looking information up in a database, and coming to conclusions about what the issue is, what you can do about it, or whether you have to escalate it.

Critical thinking is conducted within a framework and tool set. The framework consists of a three-step process. The tool set consists of the individual critical thinking techniques used in each step to guide your manual thinking.

Benefits of Critical Thinking

Critical thinking can significantly enhance your problem-solving and decision-making skills. You make better-quality decisions, come up with more innovative solutions, and enjoy faster outcomes. Some benefits of critical thinking include:

- clear understanding of problems or situations
- faster and accurate conclusions and quality decisions
- a richer variety of explanations and solutions
- opportunity recognition
- mistake avoidance
- thought-out strategies and early elimination of dead ends

Critical thinking achieves these benefits by affecting three main aspects of your thought process, explained next.

Critical Thinking Enables You to Look at Issues Differently

We often look at the problems we have to solve from a certain perspective. This means that you get a set of solutions that are consistent with the way you interpret the problem. However, when you use critical thinking tools to review problems differently, you get new perspectives and ideas.

For example, suppose your shoelace broke on your tennis shoe. If your goal was simply to fix it quickly, you might just tie the dislodged piece with a knot to the rest of the lace and jury-rig the tennis shoe tight. But if you wanted to fix it so it would last, you might replace the shoelace with another. If you decide the shoes are old and uncomfortable, you might buy another pair.

In business, you might receive customer calls about lowering the fee for service. From the perspective of keeping the customers at all costs, you might give them a discount. If your goal above all else is to provide a fair price for the value, you might have a conversation with them about the value of your service and not give them a discount, with the understanding they might not renew.

Suppose there was a spike in the workload of your department. If you thought the workload change was only temporary, you might ask your folks to work overtime or perhaps hire a short-term contractor. But if you thought the workload increase was permanent, you might start interviewing for a new full-time hire.

As you can see, different perspectives result in different solutions.

Critical Thinking Prevents a Distorted Picture

You saw in the examples at the beginning of the chapter how your brain hides information, imagines, and throws things out when operating in automatic mode. Interpretations of statements and situations vary greatly as your automatic brain attempts to compare them to a prior known situation. For example, you might misinterpret a request from a customer because you automatically think it is the same as others you recently fulfilled. Issues you think are clear are not always actually clear. Critical thinking, and being conscious about what you are thinking, minimizes this distortion and allows you to examine a situation anew.

How often are you asked for something that you respond to automatically using solely your prior experience? Without looking more clearly, you might not recognize the situation at hand is actually a bit different from prior situations—and this time, the answer can be different as well. For example, if you had a job in accounts payable, you would be accustomed to many calls from your suppliers asking for expedited payment of their invoices. When you receive your next request for faster payment, you might automatically say, "I'm sorry, we cannot. Our company policy is to pay in 45 days." However, perhaps your supplier actually sent in the invoice more than four months prior, and it was misplaced within your company. Knowing this, you would have responded, "I'm sorry, we'll expedite payment of the invoice, and you'll have payment in five days."

Critical Thinking Gives You a Framework to Think In

A framework to think in provides two huge benefits: it helps organize and guide your thinking while leveraging and incorporating others' input as well.

- *Organizing your thoughts:* Many of us think in a somewhat haphazard manner, causing us to rethink the same issue and to forget what we have already figured out, assumed, or even decided. Critical thinking helps sort it all out.
- *Incorporating others' thinking:* An important part of the critical thinking process is listening to others explain *their* thinking—which allows two things to occur. First, you might realize that others have ideas to help solve your problem. After all, you don't have exclusivity on all the good ideas. Second, listening to others' thinking stimulates new thinking in you. As a result, you may come up with ideas you would have never thought about had you not had that interaction.

The Takeaway

Critical thinking is a purposeful method for *enhancing your thoughts beyond your automatic, everyday way of thinking. It's a process that uses a framework and tool set*. The benefits result from changing the way you look at issues, organizing your thoughts, and incorporating others' thoughts. It stimulates new perspectives and prevents distorted views of a situation. As a result, your problem-solving and decision-making skills are enhanced.

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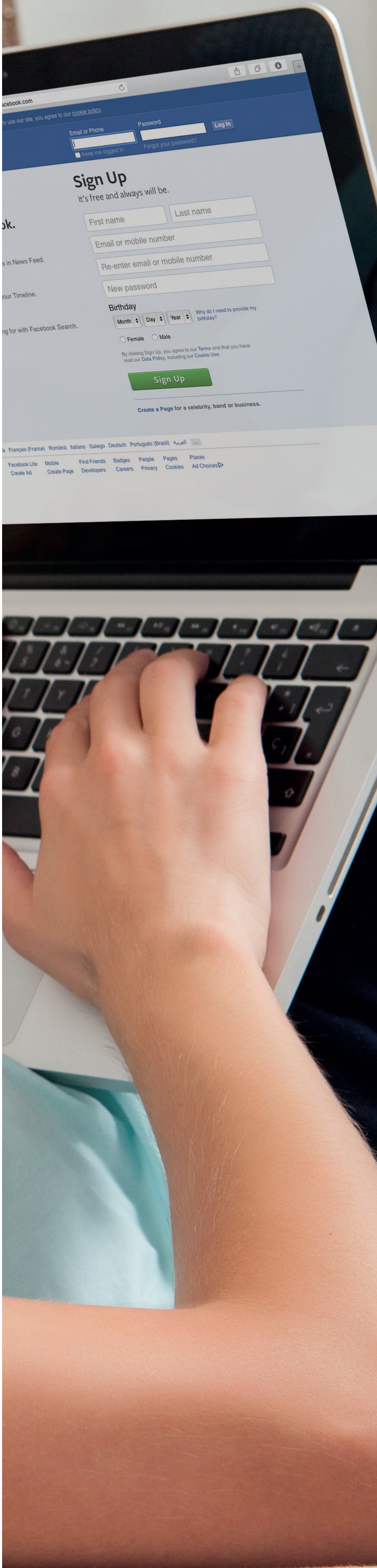
Library Social Media Guide

Library Social Media Guide

Social media is a great, and often free, tool that can help you engage your patrons, promote key services and resources in your library. But you have to know where to start! This guide's aim is to walk you through all the basics of getting started with social media for your library. Including which platforms to use, content ideas to help you start posting, best practice tips and creating a clear social strategy that aligns with your library goals.



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Contents

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Why use social media?

A vital part of marketing for a library is communicating the value of the library to current users and future users. Social is a tool that can help you accomplish this.

Social can be used to: share events, show photos, communicate important information and create a dialogue between the users of a service and the providers. Social can also help to determine what people feel are missing from their library services but can also assist in finding out what people love. This can help to shape future programming and give ideas on how funding should be allocated. It is important to keep in mind that as technology evolves and social media usage changes, it is essential for libraries to change with their users and adapt their strategy as their users' social usage evolves.

See some statistics below from Hootsuite on how your patrons are using social media:

Social media is used globally in a huge way, in fact 45% of the world's population are active social media users, that's 3.4 billion people!

JAN 2019

SOCIAL MEDIA OVERVIEW

BASED ON MONTHLY ACTIVE USERS OF THE MOST ACTIVE SOCIAL MEDIA PLATFORMS IN EACH COUNTRY / TERRITORY

3.484 BILLION

Total number of active social media users

45%

Active social media users as a percentage of total global population

3.256 BILLION

Total number of active social media users accessing via mobile devices

42%

Active mobile social media users as a percentage of the total population

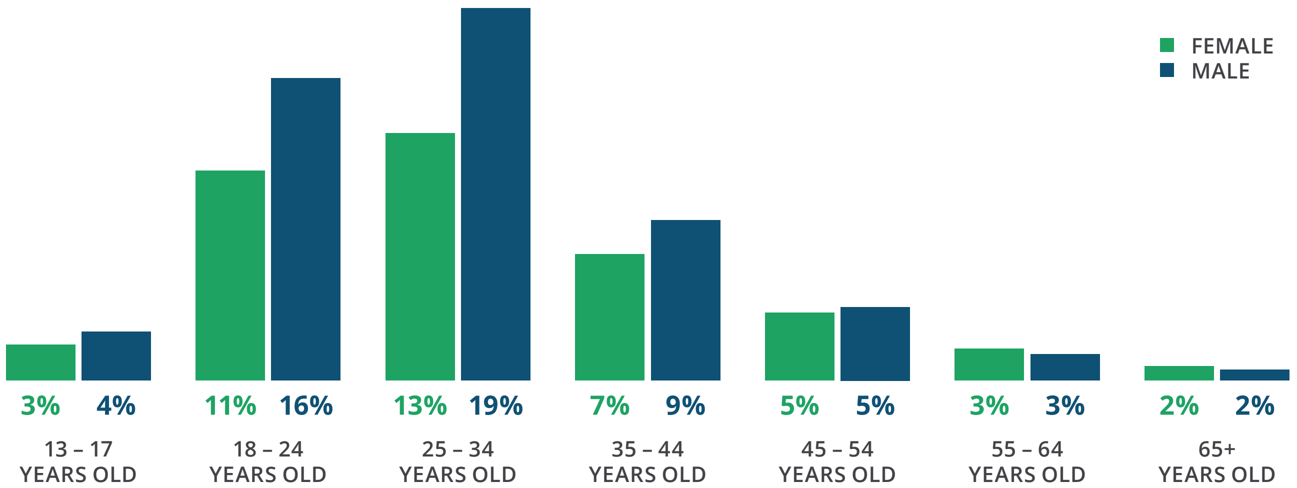
SOURCES: LATEST DATA PUBLISHED BY SOCIAL MEDIA PLATFORMS VIA PRESS RELEASES, NVESTOR EARNINGS ANNOUNCEMENTS, AND IN SELF-SERVE ADVERTISING TOOLS; ARAB SOCIAL MEDIA REPORTS; TECHRASA; NIKI AGHAEL; ROSE.RU; KEPIOS ANALYSIS

Hootsuite® we are social

The researcher community, like the rest of the world, is using social media daily. In fact, age range data from Hootsuite indicates early career researchers and students are amongst those using social media the most!

JAN 2019 | SOCIAL MEDIA AUDIENCE PROFILE

BASED ON THE COMBINED ADVERTISING AUDIENCES OF FACEBOOK, INSTAGRAM, AND FACEBOOK MESSENGER



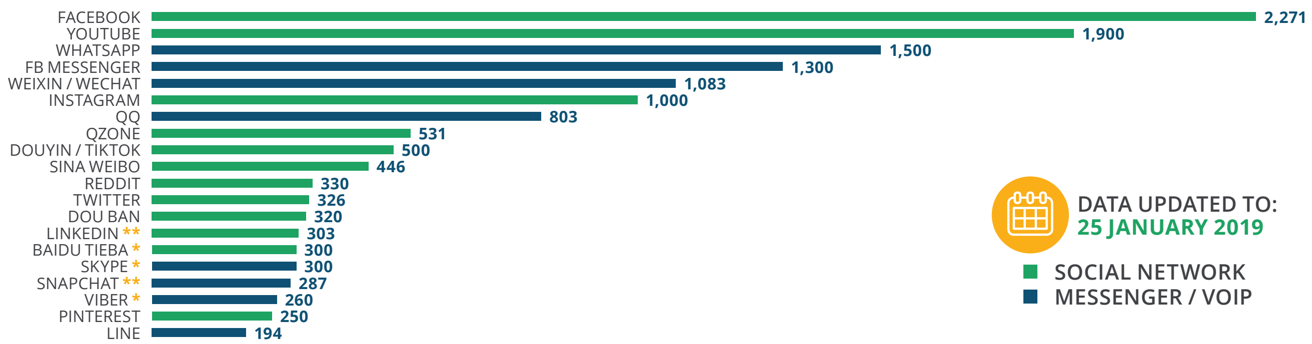
SOURCES: EXTRAPOLATED FROM FACEBOOK DATA (JANUARY 2019); KEPIOS ANALYSIS.

NOTE: FACEBOOK DOES NOT PUBLISH AUDIENCE DATA FOR GENDERS OTHER THAN 'MALE' OR 'FEMALE'. FIGURE MAY NOT SUM TO 100% DUE TO ROUNDING

Many of your patrons will be using social for their personal and work lives. This chart below shows the most popular platforms used worldwide:

JAN 2019 | SOCIAL MEDIA AUDIENCE PROFILE

BASED ON MONTHLY ACTIVE USERS, USER ACCOUNTS, OR UNIQUE VISITORS TO EACH PLATFORM, IN MILLIONS



SOURCES: KEPIOS ANALYSIS; LATEST COMPANY EARNINGS RELEASES, PRESS OR MEDIA STATEMENTS; REPORTS IN REPUTABLE MEDIA [ALL UP TO JAN 2019]. ***ADVISORY:** PLATFORMS IDENTIFIED BY [*] HAVE NOT PUBLISHED UPDATED USER FIGURES IN THE PAST 12 MONTHS, SO FIGURES MAY BE LESS RELIABLE. ** ***NOTES:** THESE PLATFORMS DO NOT PUBLISH MAU DATA. LINKEDIN FIGURE IS BASED ON MONTHLY UNIQUE WEBSITE VISITORS IN DEC 2018, VIA SIMILARWEB. SNAPCHAT FIGURE EXTRAPOLATED FROM DATA REPORTED IN TECHCRUNCH (JUN 2017).

Creating social goals

Your first step in getting started is creating social objectives that supports your overall library goals.

To help you create and write down your social objectives, use the **SMART** method.

SMART = Specific, measurable, achievable, realistic and timely.

See example of an overall library goal and SMART social objective. When you're ready, add yours in the resource below.

Overall Library Goals	SMART Social Objectives
Example: Increase usage in archival content	*Promote Archival content by driving 100 visitors per month, for 6 months, from library social platforms to archival content on library website*
Goal 1:	
Goal 2:	
Goal 3:	
Goal 4:	

If you need more support see best practices for setting social objectives and goals

How to get started on your library social account(s)?

Initially we need to define your target audience.

This step is crucial as it will help you to decide which platforms you should be using to reach them, and the type of content you will be posting. Your target audience is likely going to primarily be your patrons, but are there any other groups who you need to reach?

- Who is your target audience?
- Why do you want to reach them/ what are their challenges and how can you help?
- What social platforms are they using (personally and for work).
- What content are they posting and engaging with?

Use the resource below to help define who your audience is:

Audience	**Details** *(Use the questions above to help you give details about why they are your target audience)*
1:	
2:	
3:	

If you already have a social account: You also need to look at your existing followers. Who are they? Where are there? And, are they the same as your target audience or another group altogether? You can do this by checking the insights tool in Facebook and the analytics tool in Twitter. A nice free resource for Twitter is 'Followerwonk'

REVIEWING YOUR SOCIAL ACCOUNT

If you already have a social account(s), you will now need to deep dive into the account(s) to examine your current social activity.

Whilst you examine your account(s) think about:

- What accounts do you have? (Are you on the same platforms as your audience? Is everything active? Who has access – remove anyone who doesn't actually need it)?
- What are you posting? (Figure out what works and what doesn't, to do this you can look for keywords, phrases, content types, content themes to spot what is already resonating with your audience.)

Use the resource below to list what current social site(s) you are using and to examine the activity on those social sites.

Platform	Social Activity Overview	Review How Effective this Social Site is for Your Purposes

SETTING UP YOUR SOCIAL ACCOUNT

You can do this step if you already have a social account(s) as it will help you examine your current activity!

Now that we have clear goals and an idea of who our audience is, we need to start thinking about setting up our account(s). If you have never had a social account for your library before don't set up social accounts on multiple platforms at once. Pick the platform your audience uses the most and start with that one.

Here are some things we need to think about:

- What platforms are you going to use? (The platforms you discovered your audience are using should help you decide this)
- How regularly are you going to post? (Aim to post daily: 3-4 posts on Twitter, 2 posts on Facebook and 1-2 posts on Instagram are good starting points but overall it is more important to only post quality content. All killer, no filler.) Take a look at these best practices for some of the most used social platforms: Facebook, Twitter, and Instagram
- What is your social voice? Is it consistent? is it: Authoritative? Accessible? Friendly? Formal? Humorous? Defining how you want to library to sound on social will help you be consistent. It's essential that you take care to make your social posts sound as interesting and engaging as possible. Well crafted, enticing copy goes a long way.

Use this resource to help you answer the questions above:

Social Platform(s)	Social voice	Who is Responsible for Running Social Platforms	Posting Frequency on Social Account(s)

Check out that competition!

By checking out competitors or comparable social accounts you can examine what they are doing, what they are not doing, what is working for them and your what can learn from.

Use what you learn from your competitors or comparable accounts to create your own social strategy. Don't just duplicate but use this knowledge of what your audience is reacting to for creating content that connects with them.

To check your competitors or comparable accounts, go onto the social platform(s) you will be using for your library's social account and use the platforms search tool to hunt for: Specific libraries, university libraries, college libraries, relevant hashtags (you can find some relevant hashtags in the useful resources section)

Use the resource below to record any ideas you could utilise for your own library account.

Comparable Account or Competitor	Social Site(s)	Their Social Activity Overview. What works? What doesn't?

Content

To keep your posting relevant and consistent so that your audience stays engaged you will need to consider the types of content you will share and when.

CONTENT AUDIT

To start, you need to do a content audit of all the content you currently have.

Remember those social objectives. Consider the content you could share that will help you deliver on your goals?

Your library may create more content you could use or adapt for social than you realise. Think about images, blogs, articles, infographics, videos, how-to guides and other helpful resources.

Sort the content you have into two categories: Evergreen (content that is always relevant) and Instant (Content that is only relevant for a short period of time)

Use resource below to help you list some of the content you have. We have put some examples in to help you.

Evergreen Content *(retains relevance, it's not time sensitive and continues to drive traffic long after its first published)*	**Instant Content** *(retains relevance, it's not time sensitive and continues to drive traffic long after its first published)*
• *Example: Student Resources*	• *Example: Entertaining content*

Content library

Now that you have an idea of the types of content you have and how much you have, what are you going to do with all this content?

Create a content library!

A content library is usually an excel spread sheet that organises and contains the key details of the evergreen content you want to share over and over again on your library's social media channels.

However, to avoid sounding repetitive you should vary your writing, messaging and media in the posts that you share consistently from your evergreen content. As a best practice you should be writing posts specifically for each platform – even if you're sharing the same link or image, things like tagging, image sizing and length of post vary between platforms.

Make sure to mix up your evergreen content by adding some instant content into your feed when relevant. Also retire or refresh some content over time once you feel it has run its course.

See below an example of how to lay out your content library:

Content Type	Content Owner	Content Title	Short link
Blog	*Dominic Broadhurst*	*Digital Collections Engagement - How Can Publishers Help?*	*www.wiley.com/network/librarians/digitizing-archive-collections/digital-collections-engagement-how-can-publishers-help-2*

Content calendar

Now let's organise the content you have into a content calendar.

What do we mean by a content calendar?

A content calendar is a shareable resource that allows you to visualize how your content is distributed throughout the year whilst also allowing you to keep track of key events or holidays, such as **#NationalLibraryWeek.**

Even with a content calendar you must always monitor your social account and see what works and what doesn't so you can adapt the content that goes out accordingly.

You can find a content calendar template and further guidance on a content calendar here: Social Media Content Calendar

Content and egagement ideas

It's time to experiment with your content!

You have done your audit, library and calendar, so you should have a pretty good idea of the types of content you have but now you have to think about your social content mix.

Your content mix is the different types of content you have. You want to make sure you have a variety of different content types to be able to post on your social account(s).

Library Social Media Guide

If you feel like you don't have enough variety to your content think about what types of content you could create specifically for social such as photos, polls, questions, and video.

Work out the content mix that works best for your account(s) – this might evolve over time, but you should keep up a daily feed of fresh content.

What content types are you missing or would like to create?

Follow the links for ideas on content you could be posting to different platforms: Content Ideas and for free tools you can utilise to liven up your content or to experiment creating new content: Video and Image

> **TOP TIP:** Think about what content you'll share on different platforms. What works on Twitter may not go so well on Facebook and vice versa. If you use Instagram, remember your content will need to be entirely visual, hashtags are much more important than on Facebook. *See these best practices for Facebook, Twitter & Instagram to help you discover more about posting content to each platform.*

We have collated some brilliant examples of content from Library social media accounts. Have a look and get some ideas for what you could be doing on your account.

Eye-catching relatable image

Nice use of humour

Uses relevant hashtag

Celebrates their community

Using resources cleverly

Uses relevant hashtags

Entertaining content

Engages with patrons

Using resources cleverly

Uses relevant hashtags

Links to an event/holiday

Fun

WILEY

Here are some hashtags that you could utilise on your account(s) to support engagement and get involved in conversations.

- Open Access: #OpenAccess, #OA, #OpenData, #OpenResearch
- #LibChat
- #LibraryLife
- #FutureReadyLibs
- #inaljchat (I need a Library Job Chat)
- #critlib (Critical Pedagogy to enhance library instruction)
- #tlchat (Teacher librarians chat)
- #edchat, #infolit (all kinds of educational talk)
- #FridayReads
- #LibrarianProblems
- Events/Days: #NationalLibraryWeek, #OpenAccessWeek, #PeerReviewWeek, #WorldDigitalPreservationDay, #WorldBookDay
- Conferences: #SLATalk, #ALAAC2019, #UKSG2019

Measure success

Measurement is how you check you are achieving your objectives and goals.

Ensure your goals are measurable and then define the metrics you'll use to track them.

See examples of metrics below:

Vanity Metrics *(show visibility and building an audience)*	**Engagement Metrics** *(Show whether you are reaching the right audience, or you are posting he right content)*		**Business Metrics** *(Shows what impact is your hard work having)*
Followers	*Engagements*	*Views*	*Resolved patron queries via social*
Reach	*Link clicks*	*Engagement %*	*Website traffic from social*
	Shares	*Hashtag usage*	
	Comments		

We hope that you have found this guide useful and that it has supported you in creating a clear and coherent social strategy that links to your overall library goals. We have provided some best practices, free resources, templates and links for further support below.

If you have any ideas or resources, you think we could add to this guide let us know! Follow us on twitter at @wileylibraries and find similar content on The Wiley Network

Resources and links

STAY IN TOUCH

- Our Twitter @wileyLibraries
- Our Librarian Hub on The Wiley Network

BEST PRACTICES

- Image sizing best practices
- Creating social goals and objectives best practices
- Content Ideas for Each Platform
- Twitter best practices
- Facebook best practices
- Instagram best practices

FREE RESOURCES

- Image creation: Canva
- Video Creation: Free tools listed here
- Social media management tools: Hootsuite, Buffer, Tweet deck

TEMPLATES

- Social Strategy Template
- Social Content Calendar Template
- Social Media Audit Template

KEEP LEARNING: SOCIAL BLOGS/GUIDANCE

- Social Media Examiner
- Social Media Explorer
- Hootsuite blog, Buffer blog
- More recommendations...

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