plan

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chapter 1

consider your audience

Your audience: these are the people you are going to inform, inspire, and incite to act. Ultimately, *everything you do* when you plan, create, and deliver content is for them.

Yet, this is a dramatic shift from how we typically operate.

Take me, for instance. The most natural way for me to communicate is for myself, from my perspective, and with my preferences in mind. I live in my head, so I'm pretty familiar with what goes on in there. This means it's quite easy—I don't have to give it much thought—for me to communicate for myself.

Communicating to others is more complex. It's harder, because we have to actively work to understand them. What compels people to do the things they do? When we can identify our audience's motivations and appeal to them, we can gain their attention and drive the action we seek. In other words, it's by being thoughtful about those we are communicating to that we can get our own needs met.

In this chapter, we'll begin by prioritizing our target audience and then explore how we can better appreciate their needs. We'll also cover strategies for getting to know an unfamiliar audience. Once we have clarity on who they are, we can tailor a great number of aspects to our audience, setting the foundation to communicate effectively.

Prioritize your target audience

Who are you communicating to? When I pose this query to clients or workshop attendees, it's not uncommon for them to hold out their hands and begin counting on their fingers. They start listing groups generally: senior leadership, the board, peers, internal stakeholders, clients, customers, the public. If I allow this to go on for a bit, they get more specific: auditors, scientists, engineers, finance, store managers, regulators.

Consider your own list of audiences, the people you communicate to regularly. As you think about the various groups, note how they're each made up of different types of people who have varying requirements.

It's almost always the case—when you are communicating in the type of instances that we are focusing on here, a meeting or presentation—that you will have a number of individuals in your audience. But even given that, we often communicate too broadly and to more people than necessary. This is dangerous because it is harder to meet multiple different needs at the same time, and multiple people will almost always have different needs.

This doesn't mean that you can't communicate to more than one person at a time. It *does* highlight, however, the importance of actively prioritizing your target audience. Then you can think about them first and foremost when you craft your approach and content.

Let's explore this idea further, starting with the simplest situation. We'll ratchet up the sophistication and complexity of scenarios from there.

Clear single-person audience

Sometimes, there is an obvious individual audience for what you're doing. Take the instance where you've been asked to tackle a project or do an analysis. Your audience is likely the person who commissioned the work. In other cases, there may be a clear decision maker. When we identify a single-person audience, we can ask ourselves: what do they care about? What motivates them? What scares them? What will incite them to act? What makes them hesitant? How do they want to be communicated to? We can design the way we do everything with that person in mind, communicating *for* that individual.

Let's make this more concrete through an example. Imagine that your organization recently conducted an employee-wide survey to measure many different aspects of the work environment. You are part of the team that has analyzed the data and are now preparing to convey the results.

One unexpected finding your analysis revealed is related to communication. Employee sentiment is generally positive, with the exception of the Engineering team. So you dig deeper, further segmenting the data. You learn that the low scores are specific to one director within Engineering. This is surprising, because he's an action-oriented and tenured superstar who is highly respected by his peers. The comments from his team indicate they don't feel he communicates frequently enough or with sufficient transparency.

We can take this feedback into account when we set our communication plan. We need to relay that something isn't going well. But before simply jumping in with that, let's think about *him*—the director. There are a number of different ways we could position this finding. It might be framed as an opportunity to tackle or a blindspot to address. Perhaps he'd be best motivated by the positive impact he could have on his team's productivity by making changes to how he communicates. Or maybe the risk of losing credibility with his peer group would get his attention.

None of the ways I've outlined to potentially position the message are inherently right or wrong. They are different, and they are personal. Taking that a step further, while I wouldn't call them right or wrong, there are definitely better or worse approaches based on *who you are communicating to* in a given situation.

Use competition to drive action

I'll share another relevant lesson from my husband's experience. He was working for an organization leading HR and wanted to make changes to the paternity leave program. He recognized that he might face resistance; this wasn't necessarily high on the CEO's priority list. He also knew that this particular leader cared tremendously about offering benefits and a work environment that were at least as good as, if not better than, other organizations in the industry. Rather than lead with the idea to increase paternity leave, the HR team tried a different technique to get the CEO's support. They started by presenting the paternity leave offered by peer companies. Then they showed their own shorter leave program. They asked the CEO what he wanted to do: keep the status quo or make adjustments. With this positioning, they were able to motivate him to suggest the changes. They accomplished this by being thoughtful about how to best influence the individual.

When you have a clear single-person audience, you can address them directly. There are many aspects of how you communicate that you can tailor, which we'll discuss later in this chapter. Before we get there, let's examine the more common scenario: a mixed group.

Narrowing within a mixed audience

Mixed audiences—those consisting of people from different teams across an organization, having varying levels of seniority, or representing a multitude of companies—are challenging. The individuals who comprise them have distinct preferences and may not be aligned on the things they care about or upon which they are willing to act. It's hard to meet multiple priorities simultaneously or to encourage a group to act in a certain way when individuals are motivated by different factors. Yet, mixed audiences are a reality, and we can be smart about how we communicate to them.

When you find yourself facing a mixed group, the first thing to ask yourself is whether you can narrow it. Could you prioritize a person or smaller subset with shared interests and focus first and foremost on them?

The answer is often yes.

Let's explore this further. Imagine you work for a company that is getting ready to launch a new product. You're trying to determine how to price the product in the marketplace. The team you manage has undertaken an analysis of competitor pricing as one input into the decision-making process, and you are the one who will be communicating it.

Let's start by casting a broad net and list some prospective audiences. Who will care how we price our product? First, there are the internal stakeholders. The board will be interested in pricing. Senior management will care. Within that group, there are various people who will be involved (for different reasons): the CEO, the CFO, the Head of Product, and the Head of Sales, to name a few. Finance will want to be apprised because they'll have to factor price into their revenue models. The Sales team will be interested since they'll be the ones trying to sell the product in the marketplace. What about external stakeholders? Retailers will care how we're priced when determining whether to carry our product. Competitors will pay attention as a potential input into their own strategies. Consumers will want to know as they weigh their purchase decisions. The whole world may eventually care!

I'm being facetious to emphasize that there are a number of different potential audiences. How can we communicate successfully with so many disparate groups in mind? We can't! They care about different things. There are distinct actions we'd want each to take. We cannot communicate to all of them simultaneously. Or perhaps I should rephrase to say that, if we were to do so, we would not be successful.

We should narrow our audience for the purpose of our communication. There is a process, and more specifically, two steps we can take: narrow to now, and then identify the decision maker.

When it comes to **narrowing to now**, I mean contemplating who has to be communicated to at the current point in time. Eventually, all of the groups we listed could be interested in how we price our product, but they aren't necessarily each concerned at this moment. Let's think about our audience in the near term. The product isn't even in the marketplace, so we can strike external stakeholders from the list. We haven't yet priced it; that eliminates Finance and Sales from caring. That leaves the board and the leadership team. Narrowing to now helped us focus on a smaller group.

Next, let's **identify the decision maker** within our already reduced audience. Our goal is to price the product. The board won't be making that decision, so let's cross them off our list. That leaves us with the leadership team. Each individual may have a stake in the product price and provide input. However, they don't all have decision-making responsibility. The ultimate decision makers will be the Head of Product and the CEO. We've just successfully narrowed our audience from the whole world (or if not that, at least a lot of people) to two specific individuals. Success!

Adapting for the virtual setting

Virtual meetings are now the norm in many organizations. With this format comes some new and unique advantages—and challenges. What once might have been a small in-office meeting can expand greatly in number of attendees due to the ease with which virtual allows us to include more people. When the invite list grows, consider whether scaling back is possible or preferable. Just because you *can* invite everyone doesn't mean you should. When you don't have control over this aspect, take care to prioritize your target audience and apply select strategies outlined in the forthcoming section for communicating successfully to a mixed group.

Stepping back, not a great deal changes for the virtual environment when it comes to how we plan for our communication. There are distinct ways to optimize the materials we present for a virtual setting, which we'll discuss in the *create* chapters. Equipment and delivery differences also exist, which we'll explore in Chapters 9, 10, and 12.

This intentional process of narrowing our audience makes our jobs as communicators easier by reducing the variety of personalities and individual concerns we need to address. When getting this targeted is possible, do it. In other instances, you may face a true mixed group where you must communicate to multiple individuals simultaneously. Let's examine that now.

Facing a mixed audience

The leadership team, a steering committee, employees, customers, conference attendees: these are the kinds of groups I have in mind when someone says they have to communicate to a diverse audience. This is a tough scenario, for the reasons I've outlined. It's hard to meet varying demands equally and simultaneously. Still, there are absolutely things you can do to set yourself up for success. Let's discuss a few strategies.

Recognize—and call out—differences. One way is to start by acknowledging up front that people are coming from different viewpoints and have disparate needs. In a live meeting or presentation, articulate this challenge of mixed interests. Have a thoughtful plan on how you'll address those diverse preferences. For example, if I'm presenting a project proposal to a steering committee made up of individuals from various parts of the company, it could make sense to stick with the big picture and not get into the details. But if I know that some people are going to want more than that, I can explicitly call it out: "I'm going to stay high level today. Tom, I know you're going to want me to elaborate; I'm happy to sit down with you afterwards to walk through it." Even better—meet with Tom ahead of time to deliver his desired level of granularity so you are able to remain focused on the big picture when everyone is together.

On stage in a conference setting, you might set expectations by first explaining: "I appreciate that there are attendees with varying levels of knowledge on the topic about which I'll be speaking. I'm going to take a short amount of time up front to cover the basics, and then we'll quickly get more nuanced from there." This tells everyone in advance that their needs have been recognized and will be accounted for in some way before you're done.

Identify areas of overlap. Flipping the prior strategy around, rather than reflecting on how people or segments are different, look for similarities. Is there a common goal or pain point that will unite a group or anchor what you're going to discuss? The Big Idea worksheet is sometimes a useful tool at this juncture, which we will dive into deeply in Chapter 2. The most pertinent part to consider is *what is at stake* for your audience. In the case of a mixed group, thinking through this for each member or similar segment can be useful. Identify areas of overlap that may help you frame your approach. Recognize the consistent theme and use that to pique people's attention, get them on the same page, and motivate them to act.

Creating personas for different categories of people

When facing a large mixed audience, it is sometimes useful to create personas to segment the group and the differing perspectives you could face when presenting. These can be based on their desires or motivations and often means generalizing. I might craft Persona A, an individual with a certain type of role or personality (articulate it); who has a similar set of biases (list them); who typically cares about A, B, and C; and who is most likely to question X, Y, and Z. If you have 100 different people in your audience, it will be impossible to envisage these dimensions for each person. But if you group them into a handful of similar subgroups, it stops you from throwing your hands up in the air and simply saying, *I can't address them all*. By segmenting similar individuals in this way, you think about a number of different viewpoints and preferences, which better equips you to address them. Once you have a comprehensive mapping of the main personas, step back and strategize how to best inform them in light of their personalities and requirements.

Show something that relates to everyone. Building on the idea of looking for commonalities, one way to create areas of overlap is to show everyone something that is relevant to each person that can be compared across the broader group. Let's take the employee survey scenario that I mentioned earlier and put a twist on it. Suppose we must disseminate the results to the entire leadership team. I might include a table or graph that shows an interesting piece of the survey—for instance, the aggregate favorable score across themes broken down by the areas each individual on the leadership team oversees. This provides everyone with similar context: they see how their own function performed relative to the others and the overall company. There may also be consistent high points or low points that can be used to introduce the next level of detail or drive good discussion.

If you've ever been in a conference setting where the presenter shows a demographic breakdown of the audience or introduces real-time polling and shares the results, this is an attempt to do the same thing. They are showing something that relates to everyone and getting people involved so they are more willing to pay attention to what follows.

Verbalize to gain attention. When addressing a mixed group, you don't necessarily need everyone's attention equally all the time. Given this, when you want to make sure you have a specific person's or segment's focus (particularly where you may have lost attention by covering other content less relevant to this subset), call that out. For example, assume you are communicating to a steering committee made up of various individuals. I could say something like, "Jane, you're going to want to listen to this part because it involves your group." Or, taking the instance of a conference keynote address, I might announce, "Managers in the room, this upcoming strategy is one you'll want to bring to your teams." In this way, use vocal cues to ensure you have the right people's attention when you seek it.

Irrespective of which of these strategies you employ or combine, when you face a mixed group, ask yourself: what does success look like? Acknowledge what you can reasonably accomplish in the mixed group setting and which pieces should be broken out and shared separately in a more targeted way.

Whether dealing with a single person, communicating to a small group, or presenting to a large mixed audience, you'll have to take steps to get into their heads and understand them. Let's address that next.

Understand and assess your audience

You may know your audience. Perhaps you've communicated to them before. But have you ever paused and spent time critically assessing their priorities, preferences, and requirements? When the stakes are high, this is a task worth undertaking.

While there will be queries specific to your situation that are important to identify, this starter list of questions will help you better understand the people to whom you are speaking:

- What do they care about? What drives them?
- What scares them or keeps them up at night?
- What motivates them? What causes them to want to act?
- What prevents them from acting or makes them hesitate?
- What do they like? What makes them happy?
- What annoys or irritates them?
- To whom do they listen? What influences them?
- What is their opinion of you? Are you credible in their eyes?
- Why will they support you? (In a mixed group, *who* is likely to support you?)
- Why might they resist you? (In a mixed group, *who* will resist? Why?)
- What biases do they have?
- What constraints bind them?
- How do they measure success?

Draw and brainstorm to better understand your audience

Grab a blank piece of paper and a writing utensil for this quick exercise. Orient the paper in landscape fashion (where width is greater than height). Picture a person in your audience and then draw them in the middle of the paper, leaving blank space on either side. Your depiction will remind you that you are doing this all for someone else.

It's okay if you aren't an artist. The drawing can be a simple face or stick figure (though if you prefer to get more creative, go for it). Add a title for the person underneath your sketch. If it's a specific person, use their name or genericize with something like "supportive manager" or "hesitant client."

On the left-hand side, write words or phrases describing why the person is likely to support you. What's going to be easy? Where will they agree with you? On the right-hand side, list reasons the person might resist you. Where do they have biases or skepticism? What points will you make with which they may have contention? Try to get inside this person's head, and acknowledge or make assumptions about what drives them to feel the way you've outlined.

When you're done, read through it all and reflect: given the ways you expect support or are likely to meet resistance, how can you best set yourself up for success?

What if I don't know what my audience cares about?

Remember, the reason we are doing all of this is so we can be thoughtful about how we communicate to our audience, taking their needs into account. But what do we do if we *don't know* our audience? How do we tailor our approach to meet their preferences? Here are some tactics for getting to know an unfamiliar audience.

Talk to them. When you have direct access in advance to your audience and it makes sense to speak with them, do so. This isn't always feasible, but when it is, start here. Ask questions. Work to understand what we've discussed: what they care about, what motivates them, and what scares them. If you can't connect with your audience ahead of time, look for opportunities to understand their preferences directly before or during your presentation. Use the moments before you start to chat with people and ask questions to gain insight. Alternatively, at the beginning of your presentation, prompt discussion to uncover attendee expectations. Use that knowledge to resonate with them through your choice of words and how you navigate your materials.

Talk to someone who knows them. When you can't speak to your audience directly, consider whether there is someone who knows them with whom you could have a conversation. This could be someone who works with them or has previously communicated with them successfully—or unsuccessfully. Get insights from their work with your audience.

Talk to people who are similar to your audience. Determine what aspect of your stakeholders are least familiar to you. Are they in a role or job function that you haven't communicated to before or at a different skill level? Do they work in an industry with which you are less familiar? Find someone you can speak to who can lend a similar perspective or other helpful context.

Collect data. In some cases—for example, if you are communicating to potential consumers of your company's products or services—you may undertake market research to better understand your target audience. Other ways of collecting data include piloting or beta testing to learn how people are using your product and get feedback about their motivation. For a conference presentation, ask for information on attendees. Many conference organizers will share aggregated data about industries, companies, and roles so you can get a sense of who they are.

Read about them. If you'll be presenting to a prominent person, company, or organization, look for information online. Browse their website, look at current job postings, scan social media, and read related news. Even in the instance where it's an individual or group you're communicating to, this will give insight into the organizational culture, which can help your framing.

If you don't do any of these things—due to time constraints or other reasons—you are left to make assumptions about what matters to your audience and how best to convey information to them. When you do, think critically about how your audience is different from you. Often when we communicate, our default is to assume that everyone has the same priorities and preferences as we do. Be clear on where they are likely to deviate. This will help you to express your needs with *their* goals in mind.

Identify & pressure test your assumptions

Any time you make suppositions—whether about your audience or elsewhere as part of your project, analysis, or communication—discuss them with colleagues. Ask your peers to help you identify and pressure test any assumptions you're making by asking critical questions. If you've presumed something incorrectly, does that change things? How? In some cases, a wrong assumption won't have material impact, whereas in other situations it could change everything or call your credibility into question. Be aware of when you are making assumptions and make them as bulletproof as possible.

Working to better understand your audience and getting to know unfamiliar audiences takes time. But when the stakes are high, it's worth the effort because it means you can customize the way you communicate with their preferences in mind. Let's shift our attention to address that challenge.

Tailor for your audience

Your general approach, the materials you create, and the environment in which you meet are important aspects of the communication you can tailor specifically for your audience. Below, I've listed some questions that may help you identify specifics for each. They are primarily framed from the standpoint of having a single person or small group audience (rather than a conference session with many attendees, though you can consider variations for that scenario, too). This is not a comprehensive list but rather some ideas to get you started.

General approach

- **How do others want to be communicated to?** Will they favor an in-person meeting, a video conference, or phone call or email?

- **What's a good amount of time to plan for?** Should you keep things quick to respect their busy schedule, or do you expect they'll be generous with their time?

- **How can you best frame the general conversation?** Do they want you to build to your main point, taking them first through the relevant context, or lead by directly answering the question, "So what?"

Materials

- **How formal do you need to be?** Will your audience demand a polished slide deck or might a casual conversation better suit?

- **How do they want to receive information?** Would they prefer you send a pre-read ahead of time and meet to address questions or that you cover everything during the designated time?

- **How can you best share information?** Do they want to see slides presented on a screen or have a printed handout to flip through and use to record their notes?

- **What level of granularity do they care about?** Is it better to stick to the big picture, or will they want to go through the full details?

- **Will you incorporate data and graphs?** Does your audience value or expect data? Do they embrace or reject graphs? Should you stick to the basics, or is complex okay?

Environment

- **Where do you meet?** Do they want you to come to their office, meet in a conference room, or walk and talk? If it's a video conference, what is their preferred technology?

- **What time of day is best?** Are they energized in the morning, impatient before lunch, or typically frustrated after a specific regular meeting?

- **Should you involve others?** Will you be best off communicating on your own? Would it make sense to involve members of your team, a supporter from elsewhere in the organization, or an influencer whose involvement could help ensure success?

When you step back and think about it, you can customize numerous facets of how you plan material for your audience. You won't always be able to optimize for every element. But the more you *can* do, the better. As we discussed at the onset of this chapter, when you meet your audience's needs, you put yourself in a great position to get your own met as well.

Next, let's take a look at how to apply the ideas we've just framed.

Consider your audience: TRIX case study

I'll introduce a scenario that we will revisit throughout this book. This will allow you to see the progression through the various planning stages, the way they come together into presentation materials, and how you can prepare and deliver a stellar presentation using a real-world model. This situation is based on actual events, with details changed to preserve confidentiality.

Imagine that I work at a market research firm that gathers and analyzes information about consumer preferences. I've just led a pilot project with a new client, a prominent food manufacturing company called Nosh. If this trial run goes well, Nosh will enter into an ongoing partnership with my firm to conduct market research across all of their product lines. In other words, the stakes are high.

Nosh is interested in reworking the blend for their popular trail mix snack product, TRIX, to reduce the cost of production. Together with my research team, I've analyzed the competitive landscape and performed an in-depth study across a variety of dimensions of the current TRIX trail mix. This included the design, execution, and data analysis of a series of tests to understand consumer preference related to alternative recipes and packaging. With the help of my team, I am planning the communication—a slide deck—that I will present to Nosh outlining our findings and recommendations.

My overarching goal is to drive a discussion among the group I'll be presenting to and have them make a decision on what, if any, changes to make to the trail mix ingredients and packaging. Further, I'd like them to be sufficiently impressed with my team's work so that they recommend shifting Nosh's business in this area to our firm.

Let's start by prioritizing the target audience. Many people will be impacted by the outcome of whether to change the trail mix: individuals across numerous parts of Nosh and even outside of it if we include suppliers and customers. We don't, however, need to form our communication with all of these groups in mind. Many of them will be addressed through additional communications downstream.

If I narrow to now—the current point in time—and the decision makers, I should target the team that has been assembled from Nosh to interface with me on this project. It is a mixed group, each with unique personalities, perspectives, and interests. Let's examine the individuals who comprise it.

Vanessa is Head of Product for the product line that includes TRIX trail mix, our focus for the pilot project. She is the individual who commissioned the study with my firm and will be an advocate for ongoing work, assuming she's dazzled by what I demonstrate. On the one hand, she seems hesitant to change what time has proven is a strong product. However, she understands that the rising cost of a main ingredient is making the current mix untenable. She is highly concerned about the negative impact that modifying the product mix could have on consumer sentiment and the overall success of the TRIX brand.

Matt is Vanessa's chief of staff. He's been one of my primary points of contact throughout the project, helping to provide direction and in some cases insight into Vanessa's preferences and how to best work with her. Matt is relatively new to Nosh—he started only a few weeks prior to the beginning of this project—but he came up to speed quickly and has the benefit of having worked with Vanessa in a prior role as well as her trust. By keeping him apprised and on board with the direction I'm taking, he may be able to help influence Vanessa in useful ways.

Jack is the divisional CFO. He has a strong personality and looks closely at the numbers and cost—when he's present. Jack has a busy schedule and often misses or arrives late to project meetings. When he's unable to attend, he sends Shannon from his team to represent Finance. Shannon doesn't say much, but when Jack attends, he is extremely detail oriented and expects immediate and clear answers to his questions. Given all of this, it could make sense to meet with Jack and Shannon separately ahead of the final presentation to share full detail, get Jack's perspective, and fully answer any questions.

Jack's perception of the overall project will influence whether Nosh pursues ongoing work with my firm, so it is critical that it be a positive one.

Riley is the VP of Marketing for the TRIX brand. She's likely to be resistant to changes that will impact the marketing assets her team has already created. This includes packaging changes, which would render some marketing materials obsolete, resulting in more work for them to create new advertising collateral.

Charlie is the Customer Satisfaction Manager for the TRIX product line. He is concerned about changing what historically has been regarded as a magical mix of ingredients due to strong favorability in the market. Charlie seems to be the most risk-averse out of the group. I will need to get him comfortable with our procedures and be thoughtful about how I frame suggested changes, particularly if there's any uncertainty around consumer sentiment.

Abbey and Simon are two sensory scientists from Nosh's R&D team. It is the limited bandwidth of their team—who would normally do this type of work but is concentrating primarily on new products rather than changes to existing ones—that led Vanessa to contract my firm in the first place. Though I feared there might be some territorial issues, that hasn't materialized. Instead, Abbey and Simon have each contributed some helpful guidance that indicates support of our work. They are also meant to provide a review of our methodology to ensure consistency with the R&D team's internal processes, which my close communication throughout the project has hopefully helped safeguard.

Clearly, the people in this group have varying desires and objectives. Though they have disparate individual concerns, one care that unites them is the success of TRIX trail mix. Balancing customer sentiment and cost to manufacture will be of high interest to the group. I will use this common ground to set the stage, walk through options, and frame a hopefully fruitful discussion that leads to clear decisions.

I know our team has done amazing work here—all that's left is to convince the client group at Nosh. I've built some understanding of the various personalities

I'll be presenting to from the meetings we've had with them so far. Some of the clear allies within that group can provide insights to further inform how to best tailor my approach and materials. My final presentation to the full client group has been scheduled for three weeks from today.

We've done it: we've considered our audience. Let's turn attention to our message.


BIG IDEA