BROADCAST MESSAGING CHECKLIST

Use the following checklist to review, modify or revise your message to improve the tone, clarity, and content *before* it is distributed to your recipients. Please refer to the attached documentation for more detail.

❑ **IDENTIFY YOUR AUDIENCE(S)**
Is a broadcast *email message* the best channel for communicating with your audience(s)?

❑ **FORMAT YOUR MESSAGE**

- o Standardize the **From** field label
- o Use strong subject lines
    - Precede subject with: **FYI, Action Required (date), Urgent Attention**, or **For Distribution**
    - To aid in *distribution*, identify intended recipients at the top of the *body* of message
- o Show individual ownership. Provide a simple closing statement, name, title, and follow-up contact information at the *end* of the message
- o Encourage collaboration with local business offices, as appropriate

❑ **KNOW, FEEL, DO**

- o What do you want your readers to *know, believe,* or *understand*?
- o As a result of your message, how do you want your readers to *feel*?
- o What do want your readers to *do*?

❑ **CONSTRUCT YOUR MESSAGE**

1. Place the most important information at the top of your message: *who, what, when, where*, and *sometimes why* (the business reason for a change or necessary action)
2. Clarify what you want your reader to do next
    - Use bullets to define a series of action items
    - Use subheads to focus reader's attention, break up text
3. Place ancillary details towards the end of your message
4. Check the tone of your message. Provide contact information

❑ **FINAL REVIEW**

- o Did you keep your target audience in mind when composing your message?

- o Check the tone of your message

- o Use active voice whenever possible

- o Use passive voice to emphasize the *action* rather than the actor

- o Remove jargon

IMPROVING BROADCAST EMAIL MESSAGING

Finance and Business Operations (FBO) is interested in improving the tone, clarity, and content of email messaging. The following guidelines and tips will produce more effective communications so that recipients are clear about expectations, feel respected and informed, and can respond in a timely fashion.

IDENTIFY YOUR TARGET AUDIENCE

The first step is to clearly identify the intended recipients of your message. Using the language of the recipients, compose the message to address their needs and concerns.

FORMATTING MESSAGES

1. **Standardize the "From" field**
   Using a standard unit or department label (**Business Operations** or **Procurement**, for example) enables FBO staff to sort, store, search emails, and also apply "rules" for automating the forwarding of information within a unit. The Officers of the University will continue to use their own individual addresses.

2. **Use Strong Subject Lines**
   Strong subject lines quickly identify the topic and what action may be required by the recipient.

   a. Insert "**FYI"** at the beginning of the subject line if no action is required

   b. Use "**Action Required** *(with date)*" at the beginning of the subject line to signify an action is required

   c. Add "**Urgent Attention**" at the beginning of the subject line to alert recipients to important information that *may* require immediate attention or action

   d. Place **"For Distribution"** at the beginning of the subject line to indicate that the message needs to be distributed within the unit; to aid in actual distribution, please identify the intended recipients at the top of the *body* of the message

3. **Specify Individual Ownership of the Message**
   The individual responsible for the content of the email will *sign* or show ownership of a broadcast message by providing a simple closing statement, name, title, and follow-up contact information at the *end* of the message. The follow-up contact information may be an email redirect to an individual responsible for referring questions to the message owner or may direct inquiries to a help desk.

4. **Encourage Close Collaboration with the Business Offices**
   Central process owners and administrative units may consider adding this line at the close of each of their messages, "*Please consult with your business office regarding local unit practice,*" as appropriate. This will help avoid confusing messages that conflict with local operations of schools and departments and lessen the time faculty, staff, and students spend determining appropriate action.

BOTTOM LINE OF EFFECTIVE MESSAGES: *KNOW, FEEL, DO*

When composing email messages, it's important to understand that people are mainly listening for one thing, "how does this affect me?" Remember to tailor your messages to meet the needs of the *receiver* by using *know, feel,* and *do,* elements.

1. KNOW *What's the main thing I want people to know, believe, understand, learn, or question?* Ideally, your answer should be no longer than one or two sentences.

2. FEEL How *do I want people to feel about receiving my message? Y*our answer should be no longer than one sentence. This doesn't mean you can mandate how people will feel — "Be excited, darn it!" It is a reminder to gauge the emotional impact of your words, which might possibly change your initial delivery.

3. DO *What do I want people to do as a direct result of my communication?* We often neglect to address this piece clearly. Your answer should be no longer than one or two sentences.
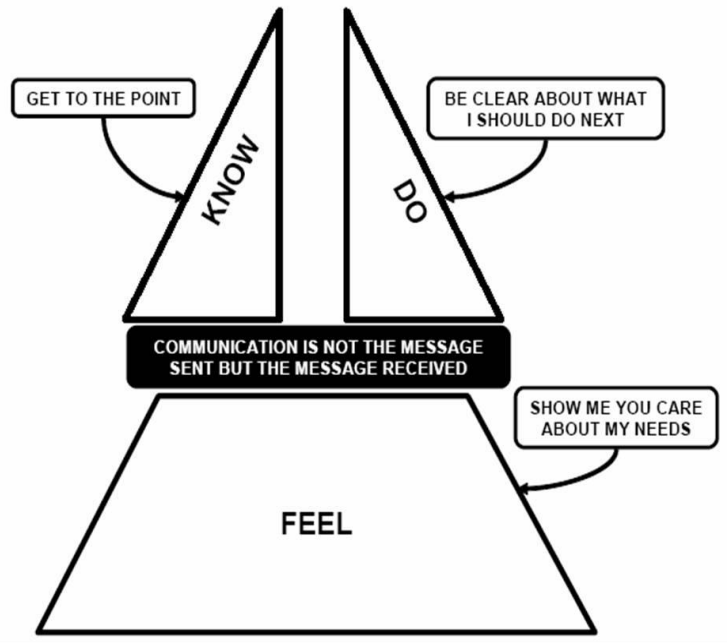
CONSTRUCTING THE MESSAGE

Know	**Put the most important information at the top of your message.** Cover the *who, what, when, where*, and *sometimes why* (the business reason for a change or necessary action) here.
Do	Be clear about what you want the reader to do or how to comply.
Feel	Check the underlying tone of your message to ensure that your readers feel respected, informed, and important.

Yale *Finance & Business Operations* | Messaging Checklist

FINAL REVIEW

- ☐ Who is your audience? — What do they value, need, or want?

- ☐ Check the tone of your message — Tone reflects the writer and affects how the recipient will receive the message. How would you feel if you received your message? Be helpful, courteous, and sincere *always*.

- ☐ Use active voice whenever possible — Use active voice to provide *clarity* and avoid wordy sentences.

- ☐ Use passive voice — Use passive voice to emphasize the *action* rather than the actor

- ☐ Remove jargon — Write plainly, clearly, and respectfully to your audience.

RESOURCES

- **Purdue Online Writing Lab**
  http://owl.english.purdue.edu/owl/resource/572/1/

- **Study Guides and Strategies: Writing:** *Identifying Your Audience*
  http://www.studygs.net/writing/audience.htm
  Complete a simple assessment and get a print-out of simple considerations for writing for your audience.

- **The Writing Center: The Writer's Handbook.** *Using the active voice*
  http://writing.wisc.edu/Handbook/CCS_activevoice.html

- **Yale Writing Center: Online Tutorials**
  http://www.yale.edu/graduateschool/writing/tutorials.html

- **Yale Business Operations:** *Communicators Toolkit*
  http://www.yale.edu/fin-bus/businessops/standards.html