

THE COMPLETE GUIDEBOOK

Clear at Work

Research-backed skills for writing, presenting, persuasion, sales, consulting and workplace relationships, with practical steps for every situation.

01 Communication foundations
03 Presentations & meetings
05 Workplace relationships
07 Business consulting

02 Business writing
04 Persuasion & negotiation
06 Sales communication

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How to use this guidebook

This book contains every topic from the Clear at Work website: the research findings, practical steps, word lists, scenarios and deep dives. The interactive tools, quizzes and calculators live on the website; each one is marked in the text where it belongs.

Read to teach

Read each topic as if you'll explain it to a coworker tomorrow. No highlighting.

Recall, don't reread

After each topic, close the book and write down what you remember. Then check what you missed.

Space your reviews

Review each topic about 1, 3, 7 and 14 days after first reading it.

Practice at work

Every topic ends with a "Practice this week" exercise. Doing it is where the learning sticks.

The 7-week plan

WEEK	PART	DAILY RHYTHM (ABOUT 20 MINUTES)
1	Communication foundations	Mon–Wed: learn one or two topics · Thu: practice at work · Fri: review and mix
2	Business writing	
3	Presentations & meetings	
4	Persuasion & negotiation	
5	Workplace relationships	
6	Sales communication	
7	Business consulting	

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Study smarter: an organized plan backed by learning research

Reading a page once feels productive, but most of it fades within days. The study habits that feel easiest, like rereading and highlighting, are among the least effective. The ones that feel harder, like quizzing yourself and spacing out reviews, are the ones that make learning last. Here's how to use Clear at Work to actually remember and use what you learn.

THE STUDY TECHNIQUE REPORT CARD

Ten popular techniques, graded by research

A major review by five learning scientists rated common study techniques on how well they work across different learners, materials and situations.

A Practice testing Quizzing yourself, flashcards, recalling from memory	A Spaced practice Spreading reviews over days and weeks
B Interleaving Mixing different topics in one session	B Elaborative questioning Asking "why is this true?"
B Self-explanation Explaining how new ideas connect to what you know	C Summarizing Useful only if you're already good at it
C Highlighting & underlining Feels productive, adds little	C Rereading Creates familiarity, not memory
C Keyword mnemonics Narrow use, slow to build	C Imagery for text Limited evidence for most material

Grades summarize the review's high, moderate and low utility ratings. Dunlosky, Rawson, Marsh, Nathan & Willingham, *Psychological Science in the Public Interest*, 2013.

Test

yourself instead of
rereading

HIGHEST-RATED TECHNIQUE

Recalling builds memory; rereading builds familiarity

Pulling information out of memory strengthens it far more than reading it again. Students who practiced recalling a passage remembered more a week later than students who reread it, even though rereading did better on a test five minutes later. That's why rereading feels effective but isn't.

Use it: After each topic, close the page and write down everything you remember. Then check what you missed. Use the flashcards below every few days.

Roediger & Karpicke, *Psychological Science*, 2006

Space

beats cram

META-ANALYSIS, 317 EXPERIMENTS

Short sessions over many days win

Spreading the same study time across several sessions produces better long-term memory than one long session. The longer you want to remember something, the bigger the gaps between reviews should be.

Use it: Review each topic about 1, 3, 7 and 14 days after first reading it. The study plan builder below schedules this for you.

Cepeda et al., *Psychological Bulletin*, 2006

Mix

topics within a session

CONTROLLED EXPERIMENTS

Interleaving helps you choose the right tool

Students who practiced shuffled types of problems did far better on a test a week later than students who practiced one type at a time, even though blocked practice felt easier. Mixing forces you to decide which strategy fits, which is exactly what real situations demand.

Use it: In review sessions, mix topics. Pair Negotiation with Emotion at work, or Email with Words that engage, and ask which ideas apply to a real situation.

Rohrer & Taylor, *Instructional Science*, 2007

Teach it

to learn it

MULTIPLE EXPERIMENTS

Expecting to teach improves what you remember

Students told they'd have to teach a passage to someone else recalled more, especially the main points, and organized it better than students told to expect a test. Nobody actually taught; just preparing to teach changed how they studied.

Use it: Read each topic as if you'll explain it to a coworker tomorrow. Better yet, actually explain it to someone.

Nestojko, Bui, Kornell & Bjork, *Memory & Cognition*, 2014

Rest

10 quiet minutes after
learning

SMALL STUDY, OLDER ADULTS

Quiet rest helps new memories settle

After hearing short stories, people who rested quietly with their eyes closed for 10 minutes remembered more than people who played a game, and in one study the benefit lasted a week. The participants were 61 to 87 years old, so treat this as promising rather than proven for everyone.

Use it: After an intense study block, take a short break without your phone. A walk or quiet sitting gives memories time to settle.

Dewar, Alber, Butler, Cowan & Della Sala, *Psychological Science*, 2012

Sleep

locks it in

DECADES OF RESEARCH

Memory is strengthened while you sleep

Research reviews conclude that sleep benefits nearly every type of memory. Even short naps after learning improved later recall compared with staying awake. Studying late and then sleeping poorly works against you.

Use it: Study important material earlier in the day or evening, and protect your sleep, especially before something important like a presentation or an exam.

Stickgold, review of sleep and memory research, 2009

ONE INTENSIVE SESSION

How to retain the most from a single 90-minute study block

Cramming fades fast, so no single session replaces spaced reviews. But if you have one block of time, this structure uses every research-backed technique above.

Preview	Topic 1	Recall	Rest	Topic 2	Teach + mix	Plan
5	25	10	10	20	15	5

1 **Preview (5 min)**

Skim the topic headings and write two questions you want answered. Curiosity primes memory.

3 **Blank-page recall (10 min)**

Close the page. Write the main points, research findings and one phrase to use. Then check and fill gaps.

5 **Read topic 2 (20 min)**

Choose a different but related topic so you can mix them.

7 **Plan reviews (5 min)**

Write three takeaways and schedule quick reviews tomorrow, in 3 days and in a week. Then get good sleep.

2 **Read topic 1 to teach (25 min)**

Read as if you'll explain it to a coworker. Use the tool in the topic. No highlighting.

4 **Quiet rest (10 min)**

No phone or email. Walk, stretch or sit quietly to let it settle.

6 **Teach and mix (15 min)**

Explain both topics out loud in your own words, then apply both to one real situation from your work.

AN ORGANIZED PATH

The 7-week Clear at Work program

About 20 minutes a day, five days a week. Each week covers one section, with built-in recall and review days.

WEEK 1 **Foundations**

Core skills, your style, listening, body language, channels, phone

WEEK 2 **Writing**

Email, tone, wording, word choice, words that engage

WEEK 3 **Presenting**

Attention, memory, presentations, meetings, remote work

WEEK 4 **Influence**

Persuasion, negotiation, career talks, difficult conversations, emotion, pushback

WEEK 5 **Relationships**

Networking, age, young people, gender, culture, apologies, new managers

WEEK 6 **Sales**

Trust, discovery, honest recommendations, objections, follow-up. Salespeople: see the 6-week sales track

WEEK 7 **Consulting**

Client process, interviews, conversations, audience attention, recommendations.

Consultants: see the 6-week consulting track

Monday–Wednesday: learn

One or two topics a day. Read to teach, use the topic's tool, then do a 3-minute blank-page recall.

Thursday: practice

Do the topic's "Practice this week" exercise at work, or fill in a printable worksheet.

Friday: review and mix

Flashcards for all terms so far, plus a quick recall of last week's section. Download the cheat sheet.

INTERACTIVE TOOL

Track your progress, no account needed

Use this tool on the Clear at Work website.

INTERACTIVE TOOL

Study plan builder

Use this tool on the Clear at Work website.

INTERACTIVE TOOL

Spaced flashcards

Use this tool on the Clear at Work website.

SOURCES

- Association for Psychological Science on Dunlosky et al. (2013), Which study strategies make the grade?
- Roediger & Karpicke (2006), Test-enhanced learning
- Cepeda et al. (2006), Distributed practice in verbal recall tasks
- Rohrer & Taylor (2007), The shuffling of mathematics practice problems boosts learning
- Washington University on Nestojko et al. (2014), Expecting to teach enhances learning
- Summary of Dewar et al. (2012), Brief wakeful resting boosts new memories
- Stickgold (2009), review of sleep and memory, PubMed Central

PART 1

Communication foundations

The core skills every professional needs: listening, first impressions, body language, and choosing the right channel for each business message.

1. Core skills
2. Your communication style
3. Listening & first impressions
4. Body language & voice
5. Choosing a channel
6. Phone & voicemail
7. Channel norms

Six skills that carry most of the weight

You don't need to be a natural speaker. These are learnable habits, and each one gets easier with practice.

Active listening

People can tell when you're waiting for your turn to talk. Listening well builds trust faster than anything you say.

- Paraphrase: "So the main concern is the timeline, right?"
- Ask open questions that start with what or how.
- Don't solve the problem until they finish describing it.

Getting to the point

Busy readers decide in seconds whether a message matters. Put the conclusion or request first, then the background.

- Use BLUF: Bottom Line Up Front.
- One message, one main purpose.
- Cut warm-up sentences like "I just wanted to reach out."

Reading the room

Tone, body language and timing matter as much as words. Notice who is quiet, who is tense, and who hasn't been asked.

- Match formality to the audience and setting.
- Watch for crossed arms, short replies, or cameras turning off.
- Ask the quiet person directly, by name.

Difficult conversations

Avoiding a hard talk usually makes it harder later. Prepare, stay on facts, and separate the problem from the person.

- Have them privately, never in a group thread.
- Describe what happened, not what you think it means about them.
- End with a clear next step both of you agree on.

Managing up

Your manager has less context than you think. Help them help you by making updates easy to scan and decisions easy to make.

- Bring a recommendation with every problem.
- Flag risks early, while there's still time to act.
- Ask how they prefer updates: weekly email, chat, or a standing 1:1.

Cross-cultural awareness

Directness, silence, hierarchy and small talk mean different things in different cultures and companies.

- Avoid idioms and sports metaphors with international teams.
- Confirm agreement in writing; a nod isn't always a yes.
- Be mindful of time zones when you schedule or expect replies.

Social skills

rose in value in the U.S. job market from 1980 to 2012

LARGE LABOR-MARKET STUDY

Jobs that need people skills grew fastest

Economist David Deming tracked U.S. jobs from 1980 to 2012. Jobs that called for high social skills (coordinating, negotiating, persuading, explaining) grew as a share of all employment, and their pay rose faster than pay for jobs that only needed strong math or technical skills. Jobs that needed both did best of all. His explanation: computers handle routine tasks well, but they can't yet replace the back-and-forth of people working out a problem together.

Use it: Treat communication as a career skill you build on purpose, the way you would build Excel or accounting skills. Technical ability gets you in the room; communication decides what you do there.

Deming, *Quarterly Journal of Economics*, 2017

Top tier

communication ranks among the attributes employers seek on new graduates' résumés

ANNUAL EMPLOYER SURVEY

Employers screen for it, and say graduates fall short

Every year the National Association of Colleges and Employers (NACE) asks employers which attributes they look for on new graduates' résumés. Problem-solving, teamwork and written and verbal communication consistently sit at or near the top of the list. Employers also tend to rate graduates as less proficient in communication than the graduates rate themselves.

Use it: Don't just list "strong communication skills" on a résumé. Show it: "Presented quarterly results to a 40-person leadership team" or "Wrote the onboarding guide now used for all new hires."

NACE *Job Outlook* survey, 2025

SELF-ASSESSMENT

Rate yourself 1 to 5 on each skill, then ask a trusted coworker to rate you

1. **Active listening:** Do people often have to repeat themselves to you? Do you summarize before you respond?
2. **Getting to the point:** Could someone tell your main point from your first two sentences?
3. **Reading the room:** Do you notice when a meeting has lost energy, or when someone has gone quiet?
4. **Difficult conversations:** Do you raise problems early, or wait until they become crises?
5. **Managing up:** Does your manager ever learn about problems from someone other than you?
6. **Cross-cultural awareness:** Do you adjust your directness and pace for international colleagues?
7. **Compare the two ratings.** The biggest gap between your score and your coworker's is your best place to start.

DEEP DIVE

Going further: Core skills

WHY IT WORKS

Most workplace communication fails for the same few reasons: the sender knows more context than the receiver, the point is buried, or the emotional temperature is wrong for the channel. These six skills each attack one of those failure points. Listening closes the context gap from your side. Getting to the point closes it from theirs. Reading the room and handling difficult conversations manage emotion. Managing up and cultural awareness adjust for power and background, the two things that most change how a message is received.

BUSINESS SCENARIO

Your team lead asks in a meeting why the client onboarding project is two weeks behind. You know the full story: a vendor delay, a scope change and a sick teammate.

WEAK APPROACH

"So, it's been kind of a long road. Back in September the vendor had some issues, and then the client asked for a couple of changes, and Sam was out for a week, and we're working through it..."

STRONG APPROACH

"We're two weeks behind, and I expect to recover one of those weeks. Two causes: a vendor delay and a client scope change. I need a decision today on whether we push the launch or drop the reporting module."

Why the strong version works: The strong answer leads with the status, gives causes in one line, and ends with what the leader needs to decide. It respects their time and shows you're in control.

COMMON MISTAKES

- Treating communication as talking, not as making sure the other person understood
- Saving the conclusion for the end, as in a school essay
- Using the same style with your manager, a client and a new hire
- Waiting until a problem is a crisis before raising it

PRACTICE THIS WEEK

Pick your next three work emails. Before sending, read only the first sentence. If the reader would not know what you want from that sentence alone, rewrite it.

SOURCES

- Deming (2017), The growing importance of social skills in the labor market, NBER
- NACE, What employers look for when reviewing college students' résumés

How do you communicate at work?

People differ in how directly they speak and whether they focus first on the task or on the people. Neither is better. Knowing your own tendencies, and recognizing others', helps you adjust with clients, managers and teammates. Answer eight workplace scenarios to see where you land.

INTERACTIVE TOOL

Communication style quiz

Use this tool on the Clear at Work website.

10–15%

of people meet researchers' criteria for self-awareness, though about 95% believe they are self-aware

RESEARCH PROGRAM

Most of us misjudge how we come across

Organizational psychologist Tasha Eurich and her team studied thousands of people. They found two kinds of self-awareness: knowing your own values and reactions (internal), and knowing how others see you (external). The two weren't related; people could be strong in one and weak in the other. Most people believed they were self-aware, but only a small share met the researchers' criteria. One surprise: asking yourself "why" ("Why did I react like that?") tended to produce stories that felt true but weren't helpful. Asking "what" ("What situations bring this out in me?") worked better.

Use it: Use the style quiz as a starting point, then check it against reality. Ask two colleagues one specific question: "What's one thing I do in meetings that helps, and one thing that gets in the way?"

Eurich, *Harvard Business Review*, 2018

STYLE	AT THEIR BEST	UNDER STRESS	WORKS WELL WITH THEM
Direct and task-first	Decisive, efficient, clear about what's needed	Blunt, impatient, steamrolls quieter voices	Lead with the bottom line. Bring options, not a story.
Direct and people-first	Energetic, persuasive, builds momentum	Overpromises, skips details, talks over others	Give them room to talk, then confirm details in writing.
Reserved and task-first	Accurate, thorough, catches what others miss	Slow to decide, overanalyzes, seems critical	Send data ahead of time. Don't ask them to decide on the spot.
Reserved and people-first	Patient, supportive, a steady listener	Avoids conflict, agrees outwardly but disagrees privately	Ask directly for their view, one-on-one, and make disagreement safe.

These four styles are a simplified model, similar to the "social styles" approach used in many corporate trainings. They describe habits, not fixed personality types, and most people shift with the situation.

FLEXING YOUR STYLE: WHAT IT SOUNDS LIKE

- **To a direct, task-first manager:** "Bottom line: we're two days behind. Here are two ways to catch up. I recommend the first."
- **To a people-first colleague:** "Before we get into the numbers, how did the client meeting go yesterday?"
- **To a reserved, detail-focused reviewer:** "I've attached the full breakdown. Could you send me your thoughts by Thursday?"
- **To a quiet teammate:** "I'd like your take on this before we decide. Want to grab ten minutes after the meeting?"

DEEP DIVE

Going further: Your communication style

WHY IT WORKS

Most workplace friction isn't about the work itself; it's about two people with different defaults misreading each other. A direct person reads hesitation as weakness. A reserved person reads directness as rudeness. Once you can name the difference, you can adjust your delivery without changing your message. This isn't being fake. It's translating, the same way you'd slow down for someone who speaks English as a second language.

BUSINESS SCENARIO

You need sign-off on a budget change from a finance director who is reserved and detail-focused.

WEAK APPROACH

Catching them in the hallway: "Hey, we need about twenty more for the campaign. Can you approve that today? It's going to be great."

STRONG APPROACH

An email two days before the meeting: "I'm requesting \$20,000 more for the Q2 campaign. The attached sheet shows the cost breakdown, expected return and what we'd cut if this isn't approved. I'd like to discuss it at Thursday's meeting."

Why the strong version works: Detail-focused people need time and data to feel comfortable deciding. Pushing for a fast yes usually produces a fast no.

COMMON MISTAKES

- Treating your own style as the "normal" one
- Using a style label as an excuse ("I'm just direct")
- Assuming quiet people have nothing to say
- Flexing so much you lose your own point

PRACTICE THIS WEEK

Pick one coworker whose style is the opposite of yours. Before your next conversation with them, plan one change to how you'll deliver your message, then notice how they respond.

SOURCES

- Eurich (2018), What self-awareness really is (and how to cultivate it), *Harvard Business Review*

Clients and colleagues decide fast. Make the first minute count.

In meetings, interviews and sales calls, people form a read on you within seconds. Then they keep judging how well you listen. Both can be practiced.

~80%

of first impressions
come down to warmth
and competence

RESEARCH PROGRAM

Warmth first, then competence

Research by Susan Fiske, Amy Cuddy and Peter Glick found people size others up on two questions: Is this person friendly? Are they capable? Together these explain most of an overall impression. Warmth is judged first and carries more weight, often within a second.

Use it: In a client meeting, open warmly: use their name, show interest in their situation. Then demonstrate competence with a specific insight about their business. Leading with credentials alone can read as cold.

Fiske, Cuddy & Glick; summarized in *Harvard Magazine*, 2010

LEVEL 1

Pretend listening

Nodding while checking email. The client can tell, and trust drops.

LEVEL 2

Listening to reply

Hearing enough to start your pitch. You miss the real objection.

LEVEL 3

Listening to understand

Focused on what they mean and need. This is where deals and solutions come from.

THE LISTENING LOOP

Four steps for any important business conversation

1. **Listen fully.** Let them finish. Put the phone face down and close the laptop.
2. **Reflect.** "So the main concern is that the rollout lands during your busy season?"
3. **Ask.** "What would a good outcome look like for your team?"
4. **Summarize and confirm.** "To recap: you need it live by March, under \$20,000, with training included. Did I miss anything?"

QUESTION BANK

Open questions that get people talking

"What's the biggest challenge your team is facing this quarter?"

"How are you handling this today?"

"What would need to be true for this to be a success?"

"What have you already tried?"

"Who else will be affected by this decision?"

"What concerns do you have that we haven't discussed?"

INTERACTIVE TOOL

Listening practice

Use this tool on the Clear at Work website.

0.1 sec

is enough for people to form a judgment of trustworthiness from a face

FIVE EXPERIMENTS

Snap judgments form in a tenth of a second

Princeton psychologists Janine Willis and Alexander Todorov showed people photos of faces for one-tenth of a second, half a second or a full second. Judgments of trustworthiness, likability and competence made after a tenth of a second closely matched judgments made with no time limit. More time mostly made people more confident, not more accurate or different.

Use it: You can't control a split-second first read, but you can make the next minute count: a real greeting, their name, eye contact and one question about them. Early warmth gives people a reason to update their snap judgment.

Willis & Todorov, *Psychological Science*, 2006

Less defensive

speakers became when they felt truly listened to

MULTIPLE EXPERIMENTS

Good listening changes how the other person thinks

In studies by Guy Itzchakov, Avraham Kluger and colleagues, people talked about their views to a listener who was either attentive or distracted. With an attentive listener, speakers felt less anxious, were less defensive and expressed more nuanced views, acknowledging both sides of an issue. Listening didn't just make people feel good; it made them more open.

Use it: When a colleague is upset or dug in, listen fully before you respond. People who feel heard become more willing to consider your point.

Itzchakov, Kluger & Castro, *Personality and Social Psychology Bulletin*, 2017

SIGNS YOU'RE REALLY LISTENING

- You can repeat their main point in your own words
- Your next question builds on what they just said
- You notice what they didn't say, or said with hesitation
- You don't check your phone or screen while they talk

PHRASES THAT SHOW YOU HEARD

"So what matters most to you is..."

"Let me make sure I have this right..."

"Say more about that."

"What I'm hearing is the timeline worries you more than the cost. Is that fair?"

FIRST-MINUTE CHECKLIST

- Stand or sit up and face the person
- Use their name once, early
- Offer a sincere, specific comment or question about them
- Let them finish their first answer without interrupting

DEEP DIVE

Going further: Listening & first impressions

WHY IT WORKS

Listening works because people judge how much you care by whether they feel understood, and they decide whether to trust your ideas based on that judgment. Reflecting back what you heard does two jobs: it catches misunderstandings early, and it signals respect. In sales and client work it also surfaces the real need, which is often different from the first request.

BUSINESS SCENARIO

A client says on a call, "Your pricing is too high."

WEAK APPROACH

"Actually, we're very competitive. Let me walk you through our value. We include onboarding, support, and our platform has..."

STRONG APPROACH

"That's helpful to know. Too high compared with what you budgeted, or compared with another quote?" (Client: "Our budget was set before we knew we'd need training.") "So the issue is really the training cost this fiscal year. What if we phased training into next quarter?"

Why the strong version works: Defending the price answers the wrong problem. One clarifying question revealed a budget-timing issue that a simple restructure could solve, without discounting.

COMMON MISTAKES

- Planning your reply while the other person is still talking
- Jumping to solutions before the problem is fully described
- Asking yes/no questions that end the conversation
- Interrupting to show you already know

PRACTICE THIS WEEK

In your next three meetings, ask one follow-up question before giving any opinion. Notice how often the second answer changes what you would have said.

SOURCES

- Harvard Magazine (2010), profile of Amy Cuddy's warmth and competence research
- Willis & Todorov (2006), First impressions: making up your mind after a 100-ms exposure to a face
- Itzchakov et al. (2017), The listener sets the tone: high-quality listening increases attitude clarity

Your words carry the message. Your delivery decides if it's believed.

In a negotiation, a presentation or a performance review, how you say something can support your words or undercut them.

MYTH

~~"Only 7% of communication is words; 93% is body language and tone."~~

This famous rule comes from Albert Mehrabian's 1960s experiments on how people convey liking or disliking with single words. Mehrabian himself said the ratios don't apply unless someone is talking about feelings or attitudes. In a budget meeting, your words matter a great deal.

WHAT HOLDS UP

Mixed signals erode trust.

The useful part of the research: when words and tone clash, like saying "I'm excited about this project" in a flat voice, people tend to believe the tone. Aim for delivery that matches your message.

FACE & EYES

Look at people when they speak and when you make key points. Norms for eye contact vary by culture, so follow the other person's lead.

VOICE

Slow down for important points and numbers. A deliberate pause before your recommendation gives it weight.

POSTURE

Sit or stand upright with hands visible. Crossed arms and turning away can read as defensive, even when you're just cold.

SPACE

Respect personal space, especially with new contacts. Stand at a comfortable conversational distance.

HANDSHAKE & GREETING

Follow local business custom. In the U.S. a brief, firm handshake is standard; elsewhere a bow, nod or no contact may be expected.

ON CAMERA

Position the camera at eye level, light your face from the front, and look at the lens when making a key point.

Voice

made job candidates seem more competent than the same words in writing

MULTIPLE EXPERIMENTS

Hearing your pitch makes you seem smarter

Juliana Schroeder and Nicholas Epley had MBA students write or record a short pitch for a job they wanted. Professional recruiters and other evaluators who heard the pitch rated the candidates as more competent, thoughtful and intelligent, and liked them more, than evaluators who read the identical words. They were also more interested in hiring them. The difference came from tone, pace and variation in the voice, which signal a thinking mind.

Use it: When something matters, such as a job inquiry, a proposal or a request for a raise, try to get it heard, not just read. Ask for a quick call, or record a short audio or video message.

Schroeder & Epley, *Psychological Science*, 2015

Feelings, not hormones

is what larger replications found about "power posing"

REPLICATION STUDIES

Power posing doesn't do what the famous talk claimed

A small 2010 study suggested that standing in an expansive "power pose" for two minutes raised testosterone and lowered stress hormones. A 2015 replication with about 200 people, led by Eva Ranehill, found no effect on hormones or risk-taking. People did report feeling slightly more powerful. Later reviews concluded that poses may modestly affect how powerful you feel, but not your hormones or performance.

Use it: Skip the poses and spend those two minutes rehearsing your opening line. Preparation is the most reliable source of a calm, confident delivery.

Ranehill et al., *Psychological Science*, 2015

VOICE CHECKLIST

Five habits that make you easier to believe

1. **Finish sentences downward.** A falling pitch at the end of a statement sounds certain. A rising one sounds like a question.
2. **Pause instead of filling.** Replace "um" and "so" with a one-second silence. Listeners hear it as composure.
3. **Slow down for numbers.** Say key figures more slowly and then stop, so people can absorb them.
4. **Vary your pace and pitch.** A flat, even voice makes even good content sound rehearsed and tiring.
5. **Breathe low before you start.** One slow breath before speaking steadies your voice more than any pose.

DEEP DIVE

Going further: Body language & voice

WHY IT WORKS

Nonverbal signals matter most when they contradict your words, because listeners treat tone and expression as harder to fake. Nervous habits like fidgeting, rushing or dropping your voice at the end of sentences signal uncertainty even when your content is strong. The goal is not to perform confidence, but to remove the signals that distract from your message.

BUSINESS SCENARIO

You're presenting a cost-saving recommendation to your department head.

WEAK APPROACH

Reading from notes, speaking quickly, voice rising at the end of each sentence as if asking a question: "We could save about forty thousand?"

STRONG APPROACH

Pause, look up, then say slowly and evenly: "We can save forty thousand dollars a year." Then stop and let the number land.

Why the strong version works: The same words carry more authority when delivered at a steady pace with a pause. The silence after a key number gives the listener time to absorb it.

COMMON MISTAKES

- Ending statements with a rising, questioning tone
- Filling every pause with "um," "like" or "so"
- Looking at slides instead of the audience
- Copying "power pose" tricks instead of just preparing well

PRACTICE THIS WEEK

Record yourself on video giving a two-minute update. Watch it once with the sound off and once with your eyes closed. Note one habit to drop.

SOURCES

- Albert Mehrabian's own explanation of the 7-38-55 findings and their limits
- ScienceDaily (2015) on Schroeder & Epley, job seekers' voices reveal intellect
- Ranehill et al. (2015), Assessing the robustness of power posing, *Psychological Science*

Email, chat, call, or face to face?

The more emotional, complex, or urgent a message is, the "richer" the channel should be. Pick a situation to see which channel fits and why.

Best fit Call or face to face

CHANNEL RICHNESS

Written, async Live, in person

- Tone of voice softens hard news in a way text can't.
- State the news early; don't bury it after small talk.
- Follow up in writing with the facts and next steps.

~34×

more effective: asking
in person rather than by
email, in one study

FIELD EXPERIMENT

We overestimate how persuasive our emails are

In a study by Mahdi Roghanizad and Vanessa Bohns, participants asked strangers to fill out a short survey, either face to face or by email. People expected both approaches to work about equally well. In fact, face-to-face requests were far more successful, about 34 times more likely to get a yes. The explanation: senders know they're trustworthy, but recipients see only an unfamiliar message with a link, which can look like spam.

Use it: For any request that matters, such as a favor, a budget approval or a referral, ask in person or by phone first. Use email to follow up and send the details.

Roghanizad & Bohns, *Journal of Experimental Social Psychology*, 2017

Richness

means how many cues
a channel carries and
how fast you get
feedback

CLASSIC THEORY

Media richness: match the channel to how unclear the message is

Management researchers Richard Daft and Robert Lengel ranked channels by "richness": face-to-face is richest (voice, expression, instant feedback), then phone, then personal written messages, then formal reports and mass email. Their theory: rich channels suit messages that are ambiguous or open to interpretation, while lean channels suit clear, routine information. Later research has added nuance (people who know each other well can handle complex topics in leaner channels), but the core idea remains a useful guide.

Use it: Ask: could this message be read two different ways? If yes, choose a richer channel. If it's purely factual, a lean one saves everyone time.

Daft & Lengel, *Management Science*, 1986

IF THE MESSAGE IS...	START WITH	FOLLOW UP WITH
A simple fact, update or FYI	Email or chat	Nothing
A request for a favor or approval	Phone or in person	Email with the details
Complex, with numbers to review	Email with attachments	Short call to discuss
Emotional: bad news, feedback, conflict	In person or video	Written summary of what was agreed
Urgent: needed within the hour	Phone call	Chat or email to confirm
Going to many people at once	Email or a meeting	Q&A channel or office hours

DEEP DIVE

Going further: Choosing a channel

WHY IT WORKS

Each channel carries a different amount of information. Face to face carries words, tone, expression and instant feedback. Email carries only words and leaves no chance to clarify in the moment. The more emotional, complex or high-stakes a message, the more cues people need to interpret it correctly, so the richer the channel should be. Simple, factual messages are the reverse: a meeting wastes time that a two-line email would save.

BUSINESS SCENARIO

You need to tell a long-time client their account manager is leaving and a new person is taking over.

WEAK APPROACH

A group email to the client: "Please note that effective Monday, Jamie will be your new point of contact."

STRONG APPROACH

A short call from the departing manager and the new one together, followed by an email that recaps the transition plan and contact details.

Why the strong version works: A relationship change creates uncertainty. A call lets the client ask questions and hear reassurance. The email that follows creates a record they can refer back to.

COMMON MISTAKES

- Using email to avoid an uncomfortable conversation
- Scheduling a meeting for something a message could handle
- Arguing in a chat thread instead of picking up the phone
- Never following up a call in writing

PRACTICE THIS WEEK

For one week, before each message ask: is this emotional, complex or urgent? If yes to any, move up one channel.

SOURCES

- University of Waterloo (2017), A face-to-face request is 34 times more successful than an email
- Daft & Lengel (1986), Organizational information requirements, media richness and structural design

The call people avoid is often the one that works best

Many professionals default to email because calls feel awkward. Research suggests that instinct is usually wrong: hearing someone's voice builds connection, clears up confusion faster, and rarely feels as awkward as people expect.

Voice

builds stronger bonds
than text

MULTIPLE EXPERIMENTS

We overestimate how awkward a call will be

People expected phone calls to feel more awkward than email, so they chose email even though they predicted a call would feel more connecting. In practice, calls created stronger bonds, weren't more awkward than expected, and took about as long as writing and reading emails. Audio alone was enough; video wasn't necessary.

Use it: When an email thread hits three back-and-forths, or a client relationship needs warming up, pick up the phone.

Kumar & Epley, *Journal of Experimental Psychology: General*, 2021

MAKING A BUSINESS CALL

- **Before:** write your goal and two or three points on a note.
- **Open:** "Hi Dana, this is Alex from Brightline. I'm calling about the renewal. Is now a good time for five minutes?"
- **During:** smile as you talk; it changes your tone. Take notes.
- **Close:** summarize next steps and who does what.
- **After:** send a two-line email recap.

THE VOICEMAIL FORMULA

"Hi Dana, this is Alex Rivera from Brightline, at 555-201-4477."

"I'm calling about the contract renewal due Friday."

"Could you call me back today or tomorrow before 4?"

"Again, Alex Rivera, 555-201-4477. Thanks."

Name and number first and last, said slowly. Keep it under 30 seconds.

ANSWERING PROFESSIONALLY

- Answer with your name: "Good morning, this is Alex."
- If you can't talk: "I'm in a meeting. Can I call you back at 2?"
- Record a short, current voicemail greeting with your name and role.
- Return calls within one business day.
- For an unscheduled call, a quick text first is often appreciated: "Got two minutes for a call?"

Smiles

are audible: listeners
can hear them in your
voice

CONTROLLED EXPERIMENT

People can hear you smile

Researchers at the University of Portsmouth recorded people speaking with and without smiling, then played the recordings to listeners who couldn't see them. Listeners could reliably tell when a speaker was smiling, and could even distinguish different kinds of smiles. Smiling changes the shape of the mouth, which changes the sound of the voice.

Use it: Before you pick up a business call or leave a voicemail, smile as you say the first line. It warms your tone without changing a single word.

Drahota, Costall & Reddy, *Speech Communication*, 2008

CONFERENCE CALLS

Running a phone meeting with several people

1. **Open with names.** "We have Dana, Luis and Priya from finance on the line." People can't see who's there.
2. **Say who's speaking.** "This is Alex. I think the Friday deadline works." It prevents confusion on audio-only calls.
3. **Call on people by name.** Silence on a phone call is ambiguous. "Priya, what's your read on this?"
4. **Mute when not speaking,** and take the call somewhere quiet.
5. **Recap out loud before hanging up:** who does what, by when. Then send it in writing.

DEEP DIVE

Going further: Phone & voicemail

WHY IT WORKS

Voice carries tone, warmth and hesitation that text strips out, so listeners understand intent faster and feel more connected. Calls also allow instant clarification, which prevents the slow misunderstandings that build up in long email chains. The barrier is mostly anticipated awkwardness, and that fear is

usually bigger than the reality.

BUSINESS SCENARIO

A client's emails have become short and tense after a missed delivery date.

WEAK APPROACH

Another careful email explaining the delay, followed by a week of terse replies.

STRONG APPROACH

A short call: "I wanted to talk this through directly. I know the delay caused problems on your end. Here's what happened and what we're doing to make sure it doesn't happen again." Then an email recap of the plan.

Why the strong version works: Hearing a real person take ownership lowers tension in a way written words rarely do, and the recap keeps a record.

COMMON MISTAKES

- Hiding behind email when tone matters
- Rambling voicemails with the number said once, quickly
- Calling without a clear purpose
- No written follow-up after agreeing on something

PRACTICE THIS WEEK

Replace one email you'd normally send with a five-minute call. Notice how long it took and how the other person responded.

SOURCES

- ScienceDaily (2020) on Kumar & Epley, voice vs. text connection
- ScienceDaily (2008) on Drahota et al., listeners can hear a smile

QUICK REFERENCE

Common norms at a glance

Typical expectations in North American offices. Your workplace may differ, so watch what respected colleagues do.

CHANNEL	TYPICAL REPLY TIME	BEST FOR	AVOID FOR
Email	within 24 hrs	Requests, records, external contacts, detail	Urgent issues, heated topics
Team chat	within 1–4 hrs	Quick questions, coordination, FYIs	Feedback, decisions that need a record
Phone call	same day	Urgent or nuanced issues, clearing up confusion	Complex data people need to reference
Video call	scheduled	Remote 1:1s, team discussions, presentations	Things a two-line message could cover
In person	scheduled	Hard conversations, praise, building relationships	Simple updates

57%

of the average workday goes to email, meetings and chat

SURVEY OF 31,000 WORKERS

Communication eats most of the workday

Microsoft's 2023 Work Trend Index, based on a survey of 31,000 people in 31 countries plus Microsoft 365 usage data, found that email, meetings and chat take up 57% of the average workday, leaving 43% for focused work. More than two-thirds of people (68%) said they didn't have enough uninterrupted time to focus.

Use it: Every message you send costs someone else time. Before sending, ask whether it needs a reply, and say so: "No reply needed" or "Reply by Friday."

Microsoft Work Trend Index, 2023

Less stress

when people checked email three times a day instead of constantly

RANDOMIZED EXPERIMENT

Checking email less often lowers stress

Kostadin Kushlev and Elizabeth Dunn asked 124 adults to check email only three times a day for one week, and as often as they liked for another week. During the limited week, people reported less daily stress. Most found it hard to stick to, even though it helped.

Use it: Batch your inbox: set two or three fixed times a day to process email, and turn off notifications in between. Tell your team when you check so urgent items come by phone.

Kushlev & Dunn, *Computers in Human Behavior*, 2015

STATUS AND AUTO-REPLY TEMPLATES

"In workshops until 3 p.m. today. I'll reply this afternoon. For anything urgent, call 555-201-4477."

"Out of office through Friday, Nov 7, with limited email. For billing questions, contact Dana Kim at dana@example.com."

"Heads-down on the quarterly report. Checking messages at 12 and 4."

SETTING EXPECTATIONS UP FRONT

"I check email twice a day, so call me if something can't wait."

"No need to reply. Just keeping you in the loop."

"Could you get back to me by end of day Thursday?"

"Got it. I'll have a full answer to you by Monday."

DEEP DIVE

Going further: Channel norms

WHY IT WORKS

Response-time norms are unwritten agreements. When someone waits longer than expected, they fill the silence with worst-case guesses: you're ignoring them, you disagree, or the work isn't getting done. Matching the norm, or setting a clear expectation when you can't, removes that anxiety.

BUSINESS SCENARIO

A client emails a question you can't answer until you check with finance, which will take three days.

WEAK APPROACH

Waiting three days and replying once you have the full answer.

STRONG APPROACH

Replying the same day: "Thanks, good question. I'm confirming the numbers with finance and will have an answer to you by Thursday."

Why the strong version works: A quick acknowledgment with a specific date costs one minute and turns silence into reliability.

COMMON MISTAKES

- Assuming silence is understood as "I'm working on it"
- Answering everything instantly, which trains people to expect it
- Ignoring time zones when judging how fast others reply
- Leaving messages "read" without a reaction or reply

PRACTICE THIS WEEK

Set an auto-reply or status the next time you have a full day of meetings. Note whether people's follow-ups drop.

SOURCES

- World Economic Forum (2023) on the Microsoft Work Trend Index findings
- PsyPost on Kushlev & Dunn (2015), checking email less frequently reduces stress

PART 2

Business writing

Emails, chat messages and reports that get read, understood and acted on, plus the psychology of the words you choose.

1. Email that gets answered
2. Tone in email & chat
3. Better wording
4. Word choice
5. Words that engage

Anatomy of an email that gets answered

A good work email can be understood from the subject line and first sentence alone. Here's one, broken into its parts.

1

Subject: Approval needed by Thu: Q4 vendor contract

2

Hi Dana,

3

Can you approve the renewal with Brightline by Thursday? It keeps our current rate for another year.

4

Key details:

- Annual cost stays at \$18,400
- Term: Jan 1 – Dec 31, 2027
- Two other quotes were 12–20% higher

5

If Thursday is tight, let me know and I'll ask them for an extension.

6

Thanks,
Jordan

1. 1

Specific subject

Includes the action and the deadline, so it can be found and prioritized.

2. 2

Greeting that fits

Match the reader's formality. "Hi" works for most workplaces.

3. 3

Ask first

The request and the main reason sit in the first two sentences.

4. 4

Scannable details

Short bullets for facts the reader needs to decide.

5. 5

Make it easy

Anticipate the likely obstacle and offer a way around it.

6. 6

Clean close

No need for a long sign-off. Keep a signature with your role and phone.

INTERACTIVE TOOL

Email builder

Use this tool on the Clear at Work website.

~2×

the response rate for a 49-word email versus a 127-word version

FIELD EXPERIMENT, 7,000 PEOPLE

Shorter emails get more replies

Harvard researcher Todd Rogers and Jessica Lasky-Fink emailed about 7,000 U.S. school board members asking them to complete a short survey. Half got a 127-word email; half got a 49-word version with the same link. The short version earned nearly twice the response rate (4.8% versus 2.7%). Readers of the short email also expected the survey to take less time, even though it was the same survey.

Use it: Before sending, cut every sentence that doesn't help the reader act. Aim for an email they can understand in under 30 seconds.

Rogers & Lasky-Fink, *Writing for Busy Readers*, 2023

50–125

words was the length range with the highest reply rates in 40 million emails

LARGE DATA ANALYSIS

What 40 million emails suggest about getting replies

The email company Boomerang analyzed replies to more than 40 million messages. Emails of 50 to 125 words got replies more than half the time. Messages written at a simple reading level outperformed those at a college reading level, and emails with one to three questions got more replies than those with none. Subject lines of three or four words did best. This is observational data from one company's users, so treat it as a pattern, not a rule.

Use it: Keep the body short, the words plain, and include a clear question. "Can you approve this by Thursday?" beats "Let me know your thoughts."

Boomerang data analysis, 2016

BEFORE YOU HIT SEND

A 60-second email check

1. **Subject:** Does it name the topic and the action? ("Approval needed by Thu: Q4 contract")
2. **First sentence:** Is the ask or main point there?
3. **One email, one topic:** Would two shorter emails be easier to act on?
4. **Length:** Can you delete a sentence without losing anything? Do it.
5. **Recipients:** Does everyone on the "To" line need to act? Move the rest to "Cc," or remove them.
6. **Attachments:** Did you attach the file, and say in a line what's in it?
7. **Tone:** Reread it as the recipient on a busy, bad day.

DEEP DIVE

Going further: Email that gets answered

WHY IT WORKS

Readers triage email in seconds based on the sender, subject and first lines. A specific subject and an ask in the first sentence let the reader decide quickly what to do with it. Bullets and white space help because people scan rather than read every word on screen. Anticipating obstacles prevents the slow back-and-forth that delays most email decisions.

BUSINESS SCENARIO

You need three department heads to approve a shared software purchase.

WEAK APPROACH

Subject: "Software". Body: four paragraphs on the history of the problem, with the request in the last line.

STRONG APPROACH

Subject: "Approval needed by Fri: shared scheduling software (\$6K/yr)". First line: "Can you each approve the purchase below by Friday? It replaces three separate tools and saves about \$2,000 a year." Then three bullets with cost, term and alternatives considered.

Why the strong version works: Each approver can decide from the subject line and first sentence. The bullets answer the questions they would otherwise reply to ask.

COMMON MISTAKES

- Vague subject lines like "Quick question" or "Update"
- Several unrelated requests in one email
- Reply-all for messages only one person needs
- Attachments with no summary of what's in them

PRACTICE THIS WEEK

Rewrite the subject lines of five emails in your sent folder to include the action and deadline. Use the new pattern going forward.

SOURCES

- Behavioral Scientist (2023), When writing for busy readers, less is more (Rogers & Lasky-Fink)
- Boomerang (2016), 7 tips for getting more responses to your emails, with data

Your reader can't hear your voice

Most business communication now happens in writing. Tone that seems obvious to you often doesn't come through, and short messages are easy to misread as curt or annoyed.

Overconfidence FIVE EXPERIMENTS

senders think their tone comes through

We overestimate how well email conveys tone

In experiments by Kruger, Epley and colleagues, people sent messages meant to be sarcastic, serious, funny or annoyed. Senders were consistently overconfident that readers would pick up the intended tone, and misreadings were common, even between friends. Senders "hear" their own voice in their writing; readers don't.

Use it: Avoid sarcasm and dry humor in work email. Before sending anything sensitive, reread it as if you were the recipient having a bad day.

Kruger, Epley, Parker & Ng, *Journal of Personality and Social Psychology*, 2005

READS AS CURT

Fine.

READS AS INTENDED

Sounds good, thanks for pulling that together.

One-word replies often feel cold in writing, even when you meant agreement.

READS AS ANNOYED

Why wasn't this sent yesterday?

READS AS INTENDED

I noticed this came in after the deadline. Is something getting in the way? Happy to help sort it out.

"Why" questions in writing can sound accusatory. Lead with curiosity.

CHAT ETIQUETTE: DO

- Send the full question in one message, not just "Hi" and then wait
- Reply in threads to keep channels readable
- Use a reaction (✓ or 👍) to confirm you've seen something
- Mirror the formality and emoji use of the person you're writing to, especially with clients
- Set a status when you're away or focused

CHAT ETIQUETTE: DON'T

- Give criticism or bad news over chat
- @mention the whole channel for non-urgent items
- Expect instant replies outside work hours
- Make decisions in side DMs that the team needs to know about
- Use ALL CAPS, which reads as shouting

SUBJECT LINE LABELS

Action needed by Fri: contract signature

Decision needed: Q1 vendor choice

FYI: new expense policy, no action needed

Recap: client call 10/27, next steps

INTERACTIVE TOOL

Tone translator

Use this tool on the Clear at Work website.

Smileys

lowered perceived
competence in first-
contact work emails

THREE EXPERIMENTS

Emojis don't work like real smiles

Ella Glikson, Arik Cheshin and Gerben van Kleef ran experiments with participants from 29 countries. In formal work emails from someone the reader didn't know, adding a smiley didn't increase how warm the sender seemed, unlike a real smile in person. It did lower how competent the sender seemed, and readers shared less information in their replies.

Use it: With new contacts, clients and senior people, skip emojis until they use them first. Show warmth with words instead: "Thanks so much for the quick turnaround."

Glikson, Cheshin & van Kleef, *Social Psychological and Personality Science*, 2018

SIGNAL	HOW IT OFTEN READS	SAFER CHOICE
"K." or "Fine."	Annoyed or dismissive	"Sounds good, thanks."
"Per my last email..."	Irritated: "you didn't read it"	"Just resurfacing this from Tuesday:"
"Thanks in advance."	Assumes a yes; some find it pushy	"Thanks for considering this."
Many exclamation points!!!	Overexcited or less serious	One, where the warmth is genuine
ALL CAPS	Shouting	Bold for the one key word
"?" alone in reply	Confused or irritated	"Could you say more about what you need?"
No greeting, no sign-off	Cold, especially with someone new	"Hi Dana," and "Thanks, Alex"

DEEP DIVE

Going further: Tone in email & chat

WHY IT WORKS

When you write, you hear your own tone of voice in your head, so the meaning feels obvious. The reader gets only the words, and fills gaps with their own mood and assumptions. Very short messages are especially easy to read as cold or annoyed. Adding a few words of warmth or context costs little and prevents most misreadings.

BUSINESS SCENARIO

Your manager sends you a chat message at 4:45 p.m.: "Can we talk tomorrow?"

WEAK APPROACH

(As the manager) Sending only that line, leaving the employee anxious all evening.

STRONG APPROACH

(As the manager) "Can we talk tomorrow for 15 minutes about planning for the Q1 kickoff? Nothing urgent."

Why the strong version works: Ten extra words remove the ambiguity. The reader knows the topic, the length and that nothing is wrong.

COMMON MISTAKES

- Sarcasm or dry jokes in writing
- One-word replies like "Fine" or "K"
- Sending sensitive messages when you're angry
- Assuming a client's short reply means they're upset

PRACTICE THIS WEEK

Before sending any message that contains criticism or a request for a fast turnaround, add one sentence of context or appreciation.

SOURCES

- Kruger et al. (2005), Egocentrism over e-mail: Can we communicate as well as we think?
- NYU Stern summary of Kruger's email research
- CNBC (2017) on Glikson et al., emojis in work emails and perceived competence

Small rewrites, better results

Common phrases that weaken a message, and stronger versions that stay polite.

INSTEAD OF ~~Sorry to bother you, but I was just wondering if maybe you had a chance to look at the report?~~	TRY Could you review the report by Friday? I need your input before I send it to finance.
Removes over-apologizing and adds a deadline and reason.	
INSTEAD OF ~~Per my last email...~~	TRY Following up on Tuesday's note: are we still on track for the 15th?
Same follow-up without the passive-aggressive edge.	
INSTEAD OF ~~That won't work.~~	TRY I'm concerned about the cost. What if we tried a smaller pilot first?
Names the specific concern and moves toward a solution.	
INSTEAD OF ~~I don't know.~~	TRY I'm not sure yet. I'll find out and get back to you by end of day.
Honest, and shows ownership with a time commitment.	
INSTEAD OF ~~Let me know if you have any questions.~~	TRY If anything in section 2 is unclear, I'm free for a call Wednesday afternoon.
Points to the likely question and offers a concrete next step.	

Smarter

is how writers seemed when they used simpler words

FIVE EXPERIMENTS

Big words make you seem less intelligent, not more

Princeton psychologist Daniel Oppenheimer gave people writing samples, such as application essays, in their original form or with words swapped for longer, fancier ones. Readers rated the authors of the plain versions as more intelligent. Hard-to-read writing made readers work harder, and they blamed the author. His paper's title makes the point by breaking the rule: "Consequences of erudite vernacular utilized irrespective of necessity."

Use it: Choose "use" over "utilize," "help" over "facilitate," "start" over "commence." Plain words read as confident, not simple.

Oppenheimer, *Applied Cognitive Psychology*, 2006

INSTEAD OF	WRITE
utilize	use
in order to	to
at this point in time	now
due to the fact that	because
in the event that	if
facilitate	help, run
leverage (as a verb)	use, build on
a large number of	many
prior to	before
with regard to	about
please be advised that	(delete it)
it is important to note that	(delete it)

PLAIN-LANGUAGE RULES

Five habits from U.S. government plain-writing guidelines

1. **Use active voice.** "We approved the budget," not "The budget was approved."
2. **Keep sentences short.** Aim for 15 to 20 words on average; one idea per sentence.
3. **Use "you" and "we."** Speak to the reader directly.
4. **Turn nouns back into verbs.** "We decided," not "We made a decision."
5. **Put the main point first,** then the support.

The U.S. Plain Writing Act of 2010 requires federal agencies to write clearly for the public; the federal plain language guidelines are a free, practical reference for any business writer.

DEEP DIVE

Going further: Better wording

WHY IT WORKS

Small qualifiers like "just," "sorry" and "I think maybe" each seem polite, but together they signal that you don't believe your own request deserves attention. Readers respond to clear, specific requests faster because there's less to interpret. Politeness comes from respect and warmth, not from shrinking the request.

BUSINESS SCENARIO

You need a colleague in another department to send data you've already requested twice.

WEAK APPROACH

"Hi! So sorry to bother you again, I just wanted to follow up and see if maybe you had a chance to look at that data? No worries if not!"

STRONG APPROACH

"Hi Lee, following up on the Q3 sales data. I need it by Wednesday to finish the board report. If it's easier, I can pull it myself if you give me access."

Why the strong version works: The strong version is still friendly, but it states the need, the deadline, the reason and an alternative. "No worries if not" told Lee the request was optional.

COMMON MISTAKES

- Apologizing for doing your job
- Ending a request with "no worries if not"
- Hedging every opinion until it says nothing
- Swinging to blunt and cold in the effort to sound confident

PRACTICE THIS WEEK

Search your sent email for "just," "sorry" and "no worries." Rewrite three examples and compare.

SOURCES

- Daily Princetonian (2006) on Oppenheimer's "erudite vernacular" study
- U.S. Office of Personnel Management, Plain Language

Words that help your message land, and words that work against you

A single word can change whether people agree, how smart they think you are, and what they remember. Start with the research, then try the message checker.

60% →
94%

agreed when a reason
was given

CLASSIC EXPERIMENT

"Because" is powerful

People asked to cut in line at a copy machine. With no reason, 60% agreed. Adding "because I'm in a rush" raised it to 94%. Even an empty reason, "because I have to make copies," got 93%. Hearing a reason made people more willing to say yes.

Use it: Attach a real reason to every request: "Can you send the file by noon, because the client call is at one?" This was a small favor, so don't count on empty reasons for big asks.

Langer, Blank & Chanowitz, 1978

Simpler

writers were rated more
intelligent

FIVE EXPERIMENTS

Big words make you look less smart

Readers rated authors as less intelligent when they used long words needlessly. Hard-to-read fonts had the same effect. When writing is easy to process, people judge both the message and the writer more favorably.

Use it: "Use" instead of "utilize." "Help" instead of "facilitate." "Start" instead of "commence." Pick readable fonts.

Oppenheimer, *Applied Cognitive Psychology*, 2006

72% vs
22%

chose the same option,
worded differently

LANDMARK STUDY

Framing changes decisions

When a plan was described as "200 people will be saved," 72% chose it. When the identical outcome was worded as "400 people will die," only 22% chose it. Same facts, different words, opposite decisions.

Use it: Be aware of the frame you choose. "90% on-time delivery" and "10% late" land differently. For big decisions, show both frames so people decide on facts, not wording.

Tversky & Kahneman, *Science*, 1981

"Don't..."

can plant the very thought you want to avoid

LAB FINDING, APPLIED

Say what to do, not only what to avoid

In Wegner's "white bear" studies, people told not to think of a white bear kept thinking of it, and thought of it even more afterward. Giving them something else to think about reduced the rebound. The research is about thoughts, but the lesson carries to instructions: give people a positive target.

Use it: "Save your work every 15 minutes" instead of "Don't forget to save."
"Keep the client informed" instead of "Don't leave the client in the dark."

Wegner et al., *Journal of Personality and Social Psychology*, 1987

WORD GUIDE

Words to use and words to avoid

These are widely taught workplace guidelines. They draw on the research above and common professional practice, rather than one specific study each.

USE

because

Gives people a reason to agree.

you / your

Centers the reader's needs: "You'll get the report Friday."

and (instead of but)

"Good work, and let's tighten section 2" keeps the praise from being erased.

I recommend

Shows confidence and gives a clear position.

will

Commits: "I will send it by 3 p.m."

thank you for your patience

Warmer than repeated apologies for small delays.

specific numbers

"Cut costs 12%" is more credible and memorable than "significantly."

plain verbs

use, help, start, show, need.

AVOID

just

"I just wanted to check" shrinks your request.

obviously, clearly

Makes anyone who didn't know feel talked down to.

always, never

Invites argument about the one exception.

but (after praise)

Listeners often discount everything before it.

to be honest

Implies you weren't honest before.

you should have

Assigns blame instead of fixing the next step.

utilize, leverage, synergy

Jargon that lowers clarity and credibility.

I think maybe

Stacked hedges undercut your point.

MESSAGE CHECKER

Message checker & readability meter

The checker highlights words from the "avoid" list and suggests replacements. An example is loaded; replace it with your own.

YOUR MESSAGE

DEEP DIVE

Going further: Word choice

WHY IT WORKS

Words shape decisions because people use them as shortcuts. "Because" signals there's a reason, so people don't have to evaluate one. Plain language is processed easily, and easy processing feels like credibility. Frames tell people what to compare against: a gain or a loss. Knowing these shortcuts helps you communicate clearly and spot when someone else is using them on you.

BUSINESS SCENARIO

You're proposing a new process to leadership that has a 90% success rate in pilots.

WEAK APPROACH

"We'd like to leverage a new paradigm to facilitate optimization. Admittedly, it failed in 10% of pilot cases."

STRONG APPROACH

"We recommend the new intake process because it worked in 9 out of 10 pilot cases and cut processing time by two days. Here's what happened in the case where it didn't work, and how we've fixed it."

Why the strong version works: Plain words, a clear reason, a positive frame and honesty about the failure case. Addressing the failure directly builds more trust than hiding it.

COMMON MISTAKES

- Using jargon to sound expert
- Choosing a frame to mislead rather than to clarify
- Stacking qualifiers that weaken the main point
- Telling people what not to do without saying what to do instead

PRACTICE THIS WEEK

Run your next important email through the message checker on this page, then read it aloud. Cut every word you wouldn't say in conversation.

SOURCES

- Langer, Blank & Chanowitz (1978), The mindlessness of ostensibly thoughtful action, *JPSP*
- EurekAlert on Oppenheimer (2006)
- Tversky & Kahneman (1981), The framing of decisions and the psychology of choice, *Science*
- Wegner, Schneider, Carter & White (1987), Paradoxical effects of thought suppression, *JPSP*

The verbs and adjectives that keep people reading

Two sentences can say the same thing and land completely differently. "We made improvements to the process" fades instantly. "We cut invoice processing from five days to two" sticks. The difference is concrete verbs, specific details and fewer empty adjectives.

Concrete

language raised
satisfaction and sales

1,000+ REAL CONVERSATIONS

Specific words make people feel heard

Researchers analyzed more than a thousand customer service calls and messages. When employees used concrete language, words people can picture like "your gray T-shirt" instead of "that item," customers were more satisfied and more likely to buy again. Concrete words signal that you were listening.

Use it: Swap general words for specific ones: "I'll rebook your Denver flight" instead of "I'll take care of that."

Packard & Berger, *Journal of Consumer Research*, 2021

Picture it

concrete sentences are
remembered better

CLASSIC MEMORY RESEARCH

If people can picture it, they remember it

Memory research has long found that concrete, easy-to-picture sentences are encoded faster and remembered better than abstract ones. "Revenue grew" is harder to hold onto than "We signed 14 new clients in March."

Use it: Anchor every abstract claim with a number, a name or an image.

Moeser, *Memory & Cognition*, 1975

Hype

words have surged, and
readers notice

LANGUAGE ANALYSIS

Promotional adjectives are everywhere, which makes them weak

A study of research grant abstracts from 1985 to 2020 found promotional adjectives like "novel," "critical," "innovative" and "unprecedented" rose dramatically. The authors warned that this kind of "spin" can reduce clarity. When every idea is "innovative," the word stops meaning anything.

Use it: Replace hype adjectives with the fact that justifies them: not "innovative process" but "the first process in our region to close books in two days."

Study of NIH grant abstracts, reported by the Association of Health Care Journalists, 2022

VERBS

Strong verbs carry the sentence

Verbs are where the action is. A precise verb does the work of a verb plus three other words. These are widely taught writing guidelines, supported by the research on concrete language above.

USE: SPECIFIC ACTION VERBS

cut · saved · built · launched · doubled · closed · fixed · won · grew · led · delivered · simplified · solved · earned · reduced · secured · negotiated · trained · streamlined · recovered · caught · shipped

Great for résumés, updates and pitches: "Cut month-end close from ten days to three."

AVOID: VAGUE OR INFLATED VERBS

do · make · get · have · handle · deal with · work on · help with · utilize · leverage · facilitate · impact · optimize · ideate · action (as a verb)

"Worked on the budget" says almost nothing. What did you actually do to it?

NOUN - HEAVY

~~We made a decision to conduct an analysis of the costs.~~

VERB - DRIVEN

We decided to analyze the costs.

Turn hidden verbs back into verbs: make a decision → decide, provide assistance → help, give consideration to → consider.

PASSIVE

~~Mistakes were made in the report.~~

ACTIVE

I made two errors in the March report.

Active voice names who did what. It's clearer, and in apologies it shows ownership.

VAGUE VERB

~~I handled client onboarding.~~

SPECIFIC VERB

I onboarded 22 new clients and cut setup time by half.

A specific verb plus a number turns a duty into an achievement.

ADJECTIVES

Fewer, sharper adjectives

The best adjectives add information. The weakest ones only add enthusiasm. When you're tempted to use an adjective, try replacing it with a number or a fact.

USE: SPECIFIC, INFORMATIVE ADJECTIVES

same-day · two-page · 15-minute · plain-English · fixed-price · step-by-step · hands-on · overdue · first-time · year-end · local · quarterly · signed · measurable · tested

"A two-page summary" tells the reader exactly what to expect. "A comprehensive summary" doesn't.

AVOID: EMPTY OR HYPE ADJECTIVES

great · amazing · awesome · nice · good · interesting · huge · innovative · cutting-edge · world-class · best-in-class · revolutionary · robust · seamless · game-changing · unprecedented

Intensifiers like "very," "really," "extremely" and "super" usually weaken a sentence. "Very important" is less convincing than saying why it matters.

HYPE

~~Our innovative, world-class solution delivers amazing results.~~

SPECIFIC

Our scheduling tool cut double-bookings by 90% for three regional clinics.

Replace every hype adjective with proof.

INTENSIFIER

~~This is a really, really important deadline.~~

REASON

If we miss Friday's deadline, we lose the client's Q1 budget.

A consequence is more persuasive than an intensifier.

WORDS THAT PULL THE AUDIENCE IN

Small phrases that keep people listening

1. **"You" and "your."** Put the audience in the sentence: "You'll save two hours a week."
2. **"For example..."** Signals that something concrete is coming.
3. **"Here's why..."** Promises an explanation, which creates a small curiosity gap.
4. **"Picture this..." or "Imagine..."** Invites the audience to visualize, which helps memory.
5. **Numbers.** "Three reasons" tells people how much is coming and keeps them oriented.
6. **Short sentences after long ones.** They create emphasis. Like this.

INTERACTIVE TOOL

Verb & adjective upgrader

Use this tool on the Clear at Work website.

DEEP DIVE

Going further: Words that engage

WHY IT WORKS

Readers build a mental picture as they read. Concrete verbs and specific details give them something to picture, which makes the message easier to understand and remember. Vague verbs and hype adjectives give them nothing to hold onto, so attention drifts. Hype also triggers skepticism: when

everything is "amazing," readers start discounting it. Precise words signal competence and care.

BUSINESS SCENARIO

You're writing the summary line on your résumé or LinkedIn profile.

WEAK APPROACH

"Hard-working, detail-oriented professional with great communication skills who is passionate about helping businesses succeed."

STRONG APPROACH

"Bookkeeper who has cleaned up the books for 30+ small businesses and cut one café's month-end close from ten days to three."

Why the strong version works: Every word adds information. The reader can picture the work and the result, so they remember you.

COMMON MISTAKES

- Stacking adjectives: "innovative, robust, scalable solution"
- Using "very" and "really" for emphasis
- Hiding verbs in nouns: "conduct a review"
- Passive voice that hides who's responsible
- Claiming qualities ("detail-oriented") instead of showing them

PRACTICE THIS WEEK

Paste your résumé summary or a recent email into the upgrader. Replace every flagged word with a specific verb or a number.

SOURCES

- Knowledge at Wharton on Packard & Berger (2021), concrete language and customer satisfaction
- Moeser (1975), Memory for language organization in concrete and abstract sentences
- Association of Health Care Journalists (2022) on promotional language in NIH grant applications

PART 3

Presentations & meetings

How to capture attention, make information stick, structure a business presentation, and run meetings in the office or online.

1. Capturing attention
2. Making it stick
3. Building a presentation
4. Running meetings
5. Remote & hybrid work

Attention isn't a timer. It's earned moment by moment.

People don't switch off at a fixed minute. They drift when nothing gives them a reason to stay. Here's what research says about catching attention and keeping it, and how to use each finding.

MYTH

~~"People have an 8-second attention span, shorter than a goldfish."~~

This figure circulates in marketing decks but has no solid research behind it. Attention depends on the task, the person and the material, not a universal stopwatch.

MYTH

~~"Audiences tune out after 10 to 15 minutes."~~

A 2016 review traced this claim and found it rests mostly on repeated citations, not primary evidence. It also found that attention varied more between teachers than between teaching formats. The speaker matters more than the clock.

46.9%

of waking hours spent
mind-wandering

LARGE STUDY

Minds wander almost half the time

Harvard researchers pinged 2,250 people at random moments through a phone app. Nearly half the time, people were thinking about something other than what they were doing. Mind-wandering also predicted lower happiness.

Use it: Assume your audience will drift and plan "re-entry points": a question, a pause, a new visual, or a change of speaker every few minutes.

Killingsworth & Gilbert, *Science*, 2010

19%

mind-wandering with
quick quizzes, vs 41%
without

CONTROLLED EXPERIMENT

Asking people to recall keeps them present

Students watched an online lecture. One group answered short questions between segments. They mind-wandered half as often, took about three times as many notes, and scored 90% on the final test vs 68% for the group that wasn't quizzed. Simply re-watching material didn't help.

Use it: Break any talk or training into segments and end each with a quick question: "What are the two risks we just covered?"

Szpunar, Khan & Schacter, *PNAS*, 2013

24 hrs

later, curious learners
still remembered more

BRAIN IMAGING

Curiosity primes the brain to remember

When people were curious about a trivia answer, the brain's dopamine reward circuit and the hippocampus (key for new memories) became more active. They remembered those answers better a day later. They even remembered unrelated faces shown while they waited.

Use it: Open with a question or a gap before giving the answer: "Last quarter, one change cut support tickets by a third. Want to guess what it was?"

Gruber, Gelman & Ranganath, *Neuron*, 2014

1–3 s

listeners' brains trail the
storyteller's

SMALL STUDY

Stories sync the speaker's and listener's brains

Brain scans showed listeners' activity mirrored a storyteller's, a second or two behind. The syncing vanished when listeners couldn't understand. In some areas, listeners' brains ran ahead, predicting what came next, and more of that prediction meant better understanding. The sample was small (11 listeners), so treat it as promising, not settled.

Use it: Wrap data in a short story with a person, a problem and a turning point. Let the audience predict the outcome before you reveal it.

Stephens, Silbert & Hasson, *PNAS*, 2010

Emotion

strengthens how
memories are stored

DECADES OF RESEARCH

Feelings make facts stick

Emotionally arousing experiences, pleasant or unpleasant, activate the amygdala, which helps strengthen long-term memories. Amygdala activity while learning emotional material strongly predicts later recall.

Use it: Show why it matters to real people: the customer who waited three weeks, the employee whose idea saved \$40,000. Keep it genuine; manufactured drama backfires.

McGaugh, *Annual Review of Neuroscience*, 2004

Less

is more for slides and
visuals

MANY EXPERIMENTS

Interesting extras can hurt learning

Mayer's multimedia research found people learn better when extra material is cut and key points are highlighted with signals like color or contrast. "Seductive details," fun but irrelevant facts or images, tend to pull attention away from the main point and reduce what people remember.

Use it: Every joke, photo or tangent should support your point. Highlight the one number that matters instead of showing the whole spreadsheet.

Mayer, *Multimedia Learning*; Rey, *Educational Research Review*, 2012

ATTENTION TOOLKIT

Before your next presentation or meeting

1. **Open with a gap.** A question, a surprising number, or a problem they care about.
2. **Segment it.** Short chunks, each ending with a question or summary.
3. **Tell one story.** A real person, a real problem, a clear outcome.
4. **Signal the key point.** Say "This is the part to remember," and show it visually.
5. **Cut the extras.** If it doesn't support the point, it competes with it.

DEEP DIVE

Going further: Capturing attention

WHY IT WORKS

Attention is a limited resource that the brain spends on what seems new, relevant or unresolved. Once a talk becomes predictable, minds drift to more pressing concerns. Questions, stories and short recall breaks work because they create open loops the brain wants to close, or force active processing instead of passive listening.

BUSINESS SCENARIO

You're running a 45-minute training on a new expense policy for 30 staff.

WEAK APPROACH

Forty slides read aloud in order, with questions saved for the end.

STRONG APPROACH

Open with a real, anonymized expense report that got rejected and ask what went wrong. Teach in three 10-minute chunks. End each chunk with a two-question quiz. Close by having pairs fix the opening report.

Why the strong version works: The opening creates curiosity, the chunks match the limits of working memory, the quizzes keep minds engaged, and the closing exercise turns knowledge into practice.

COMMON MISTAKES

- Starting with an agenda slide and housekeeping
- Adding jokes or images that don't support the point
- Packing every detail into the talk instead of a handout
- Assuming people stopped listening because they're not interested, rather than because the format lost them

PRACTICE THIS WEEK

In your next presentation or meeting, add one question in the first minute and one recall question halfway through.

SOURCES

- Bradbury (2016), Attention span during lectures: 8 seconds, 10 minutes, or more?
- Harvard Gazette on Killingsworth & Gilbert (2010)
- Szpunar et al. (2013), Interpolated memory tests reduce mind wandering
- ScienceDaily on Gruber et al. (2014)
- Stephens, Silbert & Hasson (2010), Speaker-listener neural coupling
- McGaugh (2004), The amygdala modulates the consolidation of memories
- Dartmouth summary of Mayer's 12 principles
- Overview of the seductive details effect

Getting their attention is half the job. Making it stick is the other half.

Most of what people hear in a meeting is gone within days unless something brings it back. These findings show how memory works and how to design messages that last.

THE FORGETTING CURVE

See what reviews do to memory

Without review, memory drops steeply in the first day, then levels off. Each time people revisit the material, it fades more slowly. Toggle review points to see the effect.

REMEMBERED ON DAY 30 **0%**

Illustrative model of the pattern Ebbinghaus found in 1885 and Murre & Dros replicated in 2015. Exact percentages vary by person and material.

3-5

chunks an adult can hold in mind at once

WIDELY REPLICATED

Working memory is small

Cowan's research suggests young adults can hold about three to five meaningful items in working memory at once. Older claims of "seven, plus or minus two" overestimated it when people couldn't rehearse or group the items.

Use it: Stick to three key points. Group details into named chunks: "three risks: cost, timing, staffing" is easier to hold than nine separate facts.

Cowan, *Behavioral and Brain Sciences*, 2001; *Current Directions in Psychological Science*, 2010

1 week

later, testing beat re-reading

LANDMARK STUDY

Recalling beats re-reading

Students who re-studied a passage did better on a test five minutes later. But after a week, students who had practiced recalling it did better. Pulling information out of memory strengthens it more than putting it in again.

Use it: End trainings and meetings by asking people to state the takeaways in their own words, rather than reading a summary slide to them.

Roediger & Karpicke, *Psychological Science*, 2006

317

experiments in one
review of spacing

META-ANALYSIS

Spread it out

Across 317 experiments, spaced review beat cramming the same amount into one session. The longer you need people to remember something, the longer the best gap between reviews.

Use it: Don't announce a new policy once. Mention it in the meeting, follow up by email two days later, and revisit it in a week.

Cepeda et al., *Psychological Bulletin*, 2006

First & last

items are remembered
best

CLASSIC FINDING

The serial position effect

When people recall a list, they remember the first items (primacy) and the last items (recency) better than the middle. The middle of a long presentation is where key points go to be forgotten.

Use it: State your main point in the first minute and repeat it in the last minute. Put routine details in the middle.

Murdock, *Journal of Experimental Psychology*, 1962

Words + visuals

beat words alone

MANY EXPERIMENTS

Show and tell, but don't read your slides

People learn more from words combined with relevant pictures than from words alone. But reading on-screen text aloud word for word tends to hurt learning, because listeners must process the same words twice.

Use it: Use a simple chart or image on the slide and explain it out loud. Keep slide text to a short headline.

Mayer, multimedia and redundancy principles

RETENTION PLAN

Make any message last beyond the meeting

Before

Send one question you'll answer, to spark curiosity. Limit yourself to three key points.

During

Main point first and last. Pause to have people recall. Pair each point with one visual.

After

Follow up within two days with the three points. Revisit them a week later.

DEEP DIVE

Going further: Making it stick

WHY IT WORKS

Memories fade unless they're used. Every time someone retrieves information, the memory becomes stronger and fades more slowly. That's why spaced follow-ups and recall questions beat simply repeating information. Working memory is small, so grouping details into a few chunks lets people hold onto them long enough to store them.

BUSINESS SCENARIO

Your company is rolling out a new client data privacy procedure.

WEAK APPROACH

One all-staff email with a 12-page PDF attached.

STRONG APPROACH

A 15-minute team briefing covering three key rules. A one-page summary sent the next day. A three-question quiz in the team channel a week later. A reminder in the monthly newsletter.

Why the strong version works: Three chunks fit working memory. The summary, quiz and reminder space out retrieval so the rules are remembered when it counts.

COMMON MISTAKES

- Communicating something important once and assuming it's known
- Ten key points when three would stick
- Reading summary slides to people instead of asking them to recall
- Putting the most important point in the middle

PRACTICE THIS WEEK

After your next meeting, wait two days, then ask one attendee what they remember as the main decision. Compare it with what you intended.

SOURCES

- Murre & Dros (2015), Replication and analysis of Ebbinghaus' forgetting curve
- Cowan (2010), The magical mystery four
- Roediger & Karpicke (2006), Test-enhanced learning
- Cepeda et al. (2006), Distributed practice in verbal recall tasks
- Overview of free recall and the serial position effect
- Dartmouth summary of Mayer's 12 principles

A business presentation is an argument for a decision

Whether you're pitching a client, updating leadership or training a team, the audience wants to know three things: what you want, why it matters, and what happens next. Structure your talk around those.

SAMPLE SHAPE OF A 10-MINUTE BUSINESS PRESENTATION

Hook 1 min	Main point 1 min	Point 1 2 min	Point 2 2 min	Point 3 2 min	Recap & ask 2 min
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Hook: a question, a surprising number, or the client's problem in their own words.

Main point: your recommendation, stated plainly (BLUF).

Three points: each with one piece of evidence and one example or story.

Recap & ask: repeat the main point and name the decision or next step you need.

SLIDES THAT HELP

- One idea per slide
- Headline as a full sentence: "Vendor B saves \$40K a year"
- One chart with the key number highlighted
- Detail goes in an appendix or handout

HANDLING Q&A

- Repeat or rephrase the question so everyone hears it
- Pause before answering; it reads as thoughtful
- Answer in two or three sentences, then check: "Does that answer it?"
- If you don't know: "I'll confirm that and send it by tomorrow"
- For a hostile question, acknowledge the concern, then answer the substance

MANAGING NERVES

- Memorize your first two sentences word for word
- Rehearse out loud at least twice, once standing
- Arrive early and test the screen and clicker
- Find two friendly faces and talk to them first

INTERACTIVE TOOL

Presentation planner

Use this tool on the Clear at Work website.

Headlines

as full-sentence claims
helped audiences
understand and
remember more

CLASSROOM EXPERIMENTS

Make each slide title the point, not the topic

Penn State engineering professor Michael Alley and colleagues tested the "assertion-evidence" slide design: a full-sentence claim as the headline ("Remote onboarding cut ramp-up time by two weeks"), with a chart or image as evidence below, instead of a topic title ("Onboarding") with bullets. In studies with engineering students, audiences who saw assertion-evidence slides understood the material better and had fewer misconceptions. The studies were done in classrooms, but the principle transfers well to business.

Use it: Write every slide title as the one sentence you want the audience to remember. If you can't, the slide may not need to exist.

Garner & Alley, *International Journal of Engineering Education*, 2013

STRUCTURE	BEST FOR	SHAPE
Recommendation first	Executives and decision-makers	Recommendation → three reasons → risks → ask
Problem, solution, benefit	Pitches and proposals	What's wrong → what we'd do → what it gets us
Situation, complication, resolution	Strategy and change	Where we are → what changed → what we should do
Past, present, future	Quarterly reviews and updates	What happened → where we stand → what's next
Compare options	Choosing between alternatives	Criteria → option A vs. B vs. C → recommendation

SLIDE CHECKLIST

Before you present

1. **One idea per slide.** If a slide makes two points, split it.
2. **Six lines or fewer.** More than that and the audience reads instead of listening.
3. **Font 24 point or larger,** so the back row can read it.
4. **Label your charts with the takeaway:** "Sales up 18% after the price change," not "Q3 sales."
5. **Remove decoration** that doesn't carry meaning: clip art, stock photos, animations.
6. **Put details in an appendix** or handout, and point to it when asked.

DEEP DIVE

Going further: Building a presentation

WHY IT WORKS

Listeners can't skim or reread a presentation, so they need structure spelled out. Stating your point early gives them a frame to hang the details on. Three supporting points is a manageable number for working memory. Ending with a clear ask turns understanding into action.

BUSINESS SCENARIO

You have 10 minutes with the leadership team to request two more hires.

WEAK APPROACH

Starting with team history, then workload charts, then finally: "So we were hoping maybe to get some more help."

STRONG APPROACH

"We're turning away about \$200,000 in client work each quarter because we're at capacity. I'm asking for two analysts." Then: the lost revenue, the cost of hires vs the revenue, and a client story. Close: "Can we get approval to post both roles this month?"

Why the strong version works: Leadership knows the ask in 15 seconds and spends the rest of the time evaluating evidence rather than guessing where it's going.

COMMON MISTAKES

- Building up to the point like a mystery novel
- Slides that are your speaker notes
- Running over time and rushing the ask
- No clear next step at the end

PRACTICE THIS WEEK

Write your next presentation's opening and closing sentences first. If they don't state the point and the ask, rewrite them before building slides.

SOURCES

- Garner & Alley (2013), How the design of presentation slides affects audience comprehension, *IJEE*
- Washington University CTL, In PowerPoint, it's the headline that makes the difference

MEETINGS

Run a meeting people don't dread

Check these off as you go. Your progress is saved in this browser.

BEFORE Decide if a meeting is truly needed
Write a one-line goal for the meeting
Share an agenda at least a day ahead
Invite only people who must decide or contribute
0 of 4 done

DURING Start on time, even if someone is late
Restate the goal in the first minute
Ask quieter attendees for input by name
Park off-topic items for later
0 of 4 done

AFTER Send notes within 24 hours
List each action with an owner and due date
Record decisions, not the whole discussion
Follow up on open items before the next meeting
0 of 4 done

INTERACTIVE TOOL

Meeting cost calculator

Use this tool on the Clear at Work website.

INTERACTIVE TOOL

Agenda generator

Use this tool on the Clear at Work website.

71%

of senior managers in one survey called meetings unproductive and inefficient

SURVEY OF 182 MANAGERS

Most leaders say their meetings don't work

Harvard Business School professor Leslie Perlow and colleagues surveyed 182 senior managers across industries. 71% said meetings were unproductive and inefficient, 65% said meetings kept them from finishing their own work, and 64% said meetings came at the expense of deep thinking. The authors argue the fix starts with treating meeting time as a shared, limited resource rather than a default.

Use it: Before scheduling, ask: what decision or outcome needs live discussion? If the answer is "just sharing updates," send a written update instead.

Perlow, Hadley & Eun, *Harvard Business Review*, 2017

34%

longer: sit-down
meetings compared
with stand-up
meetings, with similar
decision quality

FIELD EXPERIMENT, 111 GROUPS

Standing meetings finish faster

Allen Blueborn and colleagues had 111 five-person groups solve the same problem, either sitting or standing. Sit-down meetings lasted 34% longer, but decisions were no better. Standing groups were a little less satisfied with the meeting, so this works best for short, focused check-ins, not long planning sessions.

Use it: For daily check-ins and quick decisions, try standing, or set a hard 15-minute limit.

Blueborn, Turban & Love, *Journal of Applied Psychology*, 1999

MEETING ROLES

Five roles that keep a meeting on track (one person can hold several)

1. **Owner:** sets the goal, sends the agenda at least a day ahead, and decides whether the meeting is still needed.
2. **Facilitator:** keeps discussion on topic and makes sure quieter voices are heard: "Luis, we haven't heard from you."
3. **Timekeeper:** gives a five-minute warning per agenda item.
4. **Note-taker:** records decisions, owners and deadlines, not a full transcript.
5. **Decider:** named up front, so everyone knows whether they're giving input or making the call.

BEFORE

- Write the goal as a question: "Which vendor do we pick?"
- Invite only people who decide, contribute or must know
- Share pre-reading 24 hours ahead
- Default to 25 or 50 minutes, not 30 or 60

DURING

- Start on time, even if people are missing
- Restate the goal in the first minute
- Park off-topic items in a visible list
- Save the last five minutes for next steps

AFTER

- Send a recap within 24 hours
- List each action, owner and due date
- Note what was decided and why
- Cancel next week's meeting if it's no longer needed

DEEP DIVE

Going further: Running meetings

WHY IT WORKS

Meetings fail when nobody knows what they're for, so discussion drifts and decisions never get made. A written goal gives everyone the same target. Notes with owners and dates turn talk into action, and they protect against the common problem of attendees leaving with different memories of what was decided.

BUSINESS SCENARIO

A weekly project meeting regularly runs over and ends without decisions.

WEAK APPROACH

Same open-ended "let's go around the room" format every week.

STRONG APPROACH

Status updates move to a shared document posted before the meeting. The meeting covers only decisions and blockers, with a goal at the top of the agenda. The last five minutes are reserved for reviewing actions and owners.

Why the strong version works: Moving information-sharing out of the meeting frees live time for the things that actually need discussion.

COMMON MISTAKES

- Inviting people "just in case"
- No agenda, or an agenda with only topics and no goals
- Letting the loudest voices fill the time
- Leaving without assigning owners and dates

PRACTICE THIS WEEK

For your next meeting, write a one-sentence goal at the top of the invite: "By the end, we will have decided..."

SOURCES

- Summary of Perlow, Hadley & Eun (2017), *Stop the meeting madness*, *Harvard Business Review*
- Summary of Bluedorn, Turban & Love (1999), stand-up and sit-down meeting formats

Video calls, distributed teams and async work

Remote and hybrid teams lose the hallway conversations that fill in context. Good remote communication puts that context into writing and makes meetings fair for everyone.

4

causes of video call
fatigue

THEORETICAL ANALYSIS

Why video meetings drain people

Stanford researcher Jeremy Bailenson identified four likely causes: constant close-up eye contact, staring at your own face, being stuck in one spot, and the extra mental work of sending and reading cues on screen.

Use it: Shrink the video window, hide your self-view, take audio-only breaks in long meetings, and make cameras optional when they aren't needed.

Bailenson, *Technology, Mind, and Behavior*, 2021

Fair hybrid meetings

If one person is remote, consider having everyone join from their own laptop so no one is a face on a wall screen. Assign someone to watch the chat and raised hands.

Async updates

Replace status meetings with a short written update: what's done, what's next, what's blocked. Save live time for decisions and discussion.

Time zones

Rotate meeting times so the same people aren't always on at 7 a.m. List times in each person's zone in invitations.

Written context

Every request should stand alone: background, what you need, the deadline, and where files live. Assume the reader missed the meeting.

Camera on

was linked to more daily fatigue, especially for women and newer employees

FIELD EXPERIMENT, 103 EMPLOYEES

Cameras, not meetings themselves, drive much of the fatigue

Kristen Shockley and colleagues followed 103 employees for four weeks, with cameras on for meetings in some weeks and off in others. On camera-on days, people reported more fatigue, and fatigue reduced how engaged and vocal they were in meetings. The effect was stronger for women and for people newer to the organization, possibly because they felt more pressure to look engaged.

Use it: Make cameras optional for routine meetings, and on for short moments that need connection, like introductions or sensitive topics. Leaders can model this by turning theirs off sometimes.

Shockley et al., *Journal of Applied Psychology*, 2021

Fewer ideas

were generated by pairs brainstorming over video than in person

LAB AND FIELD EXPERIMENTS

Video calls narrow brainstorming

Melanie Brucks and Jonathan Levav found that pairs brainstorming over video produced fewer creative ideas than pairs in the same room. Eye-tracking showed video participants stared at their partner's face on the screen, while in-person pairs looked around the room more, and that wider focus helped ideas flow. Choosing the best idea worked just as well over video.

Use it: Brainstorm in person when you can. On video, try having everyone generate ideas alone first (in a shared doc), then meet to discuss and decide.

Brucks & Levav, *Nature*, 2022

HYBRID MEETING FAIRNESS

When some people are in the room and some are remote

1. **Remote first:** call on remote people first so they don't have to break into a room conversation.
2. **One person, one screen:** in-room attendees join the call from their own laptops (muted) so everyone appears equal size.
3. **Use the chat:** assign someone in the room to watch chat and raised hands.
4. **Write it down:** decisions go in a shared doc, not on a whiteboard remote people can't see.
5. **Async by default:** status updates go in writing; meetings are for discussion and decisions.

DEEP DIVE

Going further: Remote & hybrid work

WHY IT WORKS

Remote work removes the informal cues that fill in context: overheard conversations, seeing who's busy, quick hallway questions. Without them, people lack information and misread silence. Good remote communication replaces those cues deliberately with written updates, clear availability and meetings designed so remote participants aren't second-class.

BUSINESS SCENARIO

A hybrid team meets with six people in a conference room and two remote.

WEAK APPROACH

The room talks among themselves, side conversations happen, and remote members struggle to hear or get a word in.

STRONG APPROACH

Everyone joins on their own laptop with headphones, even in the room. The facilitator calls on remote people first in discussions. A shared document holds the agenda and notes.

Why the strong version works: Putting everyone on the same footing means ideas are heard on merit, not on who's physically present.

COMMON MISTAKES

- Treating remote attendees as an afterthought
- Making decisions in the hallway after the meeting
- Requiring cameras on all day
- Assuming people are always online because their status is green

PRACTICE THIS WEEK

Write your next status update so someone who missed every meeting this week would understand it.

SOURCES

- Stanford News (2021), Four causes of "Zoom fatigue" and their fixes
- ScienceDaily (2021) on Shockley et al., cameras and virtual meeting fatigue
- Brucks & Levav (2022), Virtual communication curbs creative idea generation, *Nature*

PART 4

Persuasion & negotiation

What makes clients and colleagues say yes, how to negotiate deals and raises, and how to handle the conversations most people avoid.

1. Getting to yes
2. Negotiation
3. Interviews & career talks
4. Difficult conversations
5. Emotion at work
6. Pushing back without a fight
7. Frameworks

What makes people say yes

People agree when a request makes sense, feels fair, and is easy to act on. Decades of research point to a handful of reliable patterns. Used honestly, they help good ideas get the support they deserve.

CIALDINI'S SEVEN PRINCIPLES OF INFLUENCE

Reciprocity

People want to return favors.

Help a colleague hit their deadline before you ask for help with yours.

Commitment

People stay consistent with what they've already said or done.

Get agreement on the goal first: "We all want fewer late invoices, right?"

Social proof

People follow what others like them do.

"Three other teams already switched, and their approval time dropped."

Liking

People say yes to people they like and relate to.

Find real common ground and give sincere, specific compliments.

Authority

People trust credible expertise.

Mention relevant experience early: "In my eight years on audits..."

Scarcity

Limited things feel more valuable.

Name real limits only: "Only two training seats are left this quarter."

Unity

Shared identity builds trust.

"As fellow first-year analysts, we both know how confusing month-end is."

17% →
76%

agreed to a big ask
after a small yes

CLASSIC, MIXED REPLICATION

Start small: the foot in the door

Only 17% of homeowners agreed to put a large "Drive Carefully" sign in their yard. But 76% agreed if they had first said yes to a tiny window sticker. Later research shows the effect is real but often smaller and less consistent than this first study.

Use it: Ask for a 15-minute call before asking someone to join your project.

Freedman & Fraser, 1966

17% →
50%

agreed after first
turning down a bigger
ask

CLASSIC EXPERIMENT

Concede from a bigger ask: the door in the face

Students were asked to chaperone a zoo trip. 17% agreed. When they were first asked to volunteer two hours a week for two years and said no, 50% then agreed to the zoo trip. The smaller request felt like a fair concession. It works best when the second ask comes right away and the person asking is credible.

Use it: In negotiations, open with your full, reasonable request, then offer a genuine smaller alternative. Never invent an absurd first ask; people notice.

Cialdini et al., 1975

38% →
48%

reused towels when
told most guests do

FIELD EXPERIMENT

"Most people do this" beats "please do this"

A hotel's standard "help the environment" card got about 38% of guests to reuse towels. A card saying most guests reuse their towels raised that to about 48%. People follow what others actually do.

Use it: "Most of the team submits timesheets by Friday noon" works better than "Please submit your timesheet." Never say "nobody does this," which normalizes the problem.

Goldstein, Cialdini & Griskevicius, *Journal of Consumer Research*, 2008

Reminding people they're free to say no

Adding "but of course, you're free to decline" showed a medium boost to agreement across 52 experiments, especially face to face. But a 2024 re-examination found the effect nearly disappeared in the most rigorous studies. It may help a little, and it never hurts trust.

Use it: End requests with a genuine out: "No pressure if your plate is full." Do it because it's respectful, not as a trick.

Meta-analysis and re-examination, *Meta-Psychology*, 2024

REQUEST BUILDER

Build an ask people want to say yes to

Fill in each part and the builder assembles a message using the research above: a clear ask, a reason, what's in it for them, an easy next step, and a genuine choice. An example is filled in.

Who you're asking What you need By when Because (your reason) What's in it for them Make it easy

YOUR MESSAGE

Hi Priya, Could you review the Q4 budget summary by Thursday at noon, because it goes to the leadership team on Friday? It also means your forecast numbers will be front and center. It's two pages, and I've highlighted the three lines that need your eyes. If your plate is too full this week, no problem. Just let me know. Thanks!

- ✓ Clear, specific ask
- ✓ Deadline
- ✓ A reason ("because")
- ✓ Benefit to them
- ✓ Easy next step
- ✓ Genuine freedom to say no

PERSUASION VS MANIPULATION

The line to stay behind

Persuasion helps people see why something is good for them. Manipulation gets them to act against their own interest. Ask yourself: would I be comfortable if they knew exactly what I was doing and why?

- | | |
|------------------------------------|---------------------------------------|
| • Real reasons and real deadlines | • Fake scarcity or invented deadlines |
| • Honest data about what others do | • Guilt trips and pressure |
| • Concessions you actually mean | • Hiding costs or downsides |
| • Room to say no | • Flattery you don't mean |

DEEP DIVE

Going further: Getting to yes

WHY IT WORKS

Persuasion principles work because they are mental shortcuts people use to make decisions quickly. If others are doing it, it's probably reasonable. If someone did me a favor, I should return it. If an expert recommends it, it's probably right. These shortcuts are usually sensible, which is why they're powerful and why misusing them damages trust when people notice.

BUSINESS SCENARIO

You want your team to adopt a new project tracking tool.

WEAK APPROACH

Announcing in an email: "Starting Monday, everyone must use the new tool."

STRONG APPROACH

First, help two respected teammates set it up and get their feedback (reciprocity, liking). Share their results with the team (social proof). Ask everyone to commit to trying it for two weeks (commitment). Explain the reason: fewer status meetings (because).

Why the strong version works: People are more likely to adopt change they've had a voice in, seen working for peers, and agreed to try.

COMMON MISTAKES

- Inventing urgency or scarcity
- Relying on authority alone: "because I said so"
- Asking for a big commitment before any small ones
- Using persuasion tactics on people who would object if they saw them

PRACTICE THIS WEEK

Use the request builder for one real ask this week. Note whether including a reason and a benefit changed the response.

SOURCES

- Influence at Work (Robert Cialdini's organization), The science of persuasion
- Freedman & Fraser (1966), Compliance without pressure: the foot-in-the-door technique, *JPSP*
- Cialdini et al. (1975), Reciprocal concessions procedure for inducing compliance, *JPSP*
- APS on the hotel towel study (Goldstein et al., 2008)
- The effectiveness of the "But-you-are-free" technique, *Meta-Psychology*

Negotiate the problem, not against the person

Raises, vendor contracts, project deadlines and budgets are all negotiations. The most widely taught business method comes from Roger Fisher and William Ury's *Getting to Yes*, developed at the Harvard Negotiation Project.

PRINCIPLE 1

Separate people from the problem

"I want this to work for both of us. Let's look at the numbers together."

PRINCIPLE 2

Focus on interests, not positions

A vendor's "\$50,000, firm" may really mean "we need guaranteed volume."

PRINCIPLE 3

Create options before deciding

Longer contract for a lower rate? Phased payments? Bundled training?

PRINCIPLE 4

Use objective criteria

Market salary data, industry benchmarks, competing quotes.

KNOW YOUR BATNA

Best Alternative To a Negotiated Agreement

Your BATNA is what you'll do if this deal falls through. It sets your walk-away point and is your real source of leverage. If you're negotiating with a vendor and have a solid quote from a competitor, you have a strong BATNA. Improve it before you negotiate.

Position (what they say)	Interest (why)
"I need a \$75,000 salary."	Cover rising rent, feel valued, match a peer's pay
"We can't move the deadline."	Their own client launch depends on it
"Payment is due in 30 days."	Cash flow at quarter end

Say these at the table

- "Help me understand what's driving that number."
- "What would make this work for you?"
- "Based on three quotes we received, the market range is..."
- "If we could do X, would you be open to Y?"
- "Let me take that back to my team and get back to you by Thursday."

INTERACTIVE TOOL

Negotiation prep worksheet

Use this tool on the Clear at Work website.

First offer

tends to anchor the
final deal

MULTIPLE EXPERIMENTS

The first number on the table pulls the outcome toward it

Adam Galinsky and Thomas Mussweiler found that whoever made the first offer in a negotiation tended to get a better final result, because the first number becomes an "anchor" that shapes the whole discussion. The effect weakened when the other side focused on their own goals or thought about the first offerer's alternatives. Making the first offer is most useful when you've researched a fair range; if you know little about market value, letting the other side go first can protect you.

Use it: Prepare your number from real data (market rates, past deals, quotes). If you're well prepared, open first and justify it briefly.

Galinsky & Mussweiler, *Journal of Personality and Social Psychology*, 2001

\$4,850

beat \$5,000 as an
opening offer: precise
numbers drew smaller
counteroffers

MULTIPLE EXPERIMENTS

Precise numbers signal homework

Malia Mason and colleagues at Columbia Business School found that precise opening offers like \$4,850 drew counteroffers closer to the opening number than round ones like \$5,000. People assumed a precise number was based on careful research, so they adjusted less.

Use it: If your number comes from real analysis, show it: "\$62,400, based on the median for this role in our region," rather than "about \$60,000."

Mason, Lee, Wiley & Ames, *Journal of Experimental Social Psychology*, 2013

WHEN THEY MAKE AN EXTREME OFFER

"That's quite far from what we've seen in the market. How did you arrive at it?"

"I can't work from that number, but I'd like to find something that works. What's most important to you here?"

WHEN YOU NEED TIME

"Let me look at this with my team and get back to you by Thursday."

"I want to make sure I give you a considered answer. Can we pick this up tomorrow?"

TRADING INSTEAD OF CONCEDED

"If we sign a two-year term, could you hold the current rate?"

"We can meet that price if delivery moves to March."

DEEP DIVE

Going further: Negotiation

WHY IT WORKS

Positional bargaining, where each side names a number and inches toward the middle, treats negotiation as a tug of war. Interest-based negotiation works better because most deals contain things one side values more than the other. Uncovering interests creates options that can make both sides better off. Objective criteria make the outcome feel fair, which helps the relationship survive the deal.

BUSINESS SCENARIO

You're negotiating a raise. Your manager says the budget allows only a 3% increase.

WEAK APPROACH

"3% isn't enough. I need at least 10%." Back-and-forth until settling at 5%.

STRONG APPROACH

"I understand the budget constraint. Based on salary data for this role in our region, I'm about 12% below the midpoint. Could we look at a 5% raise now, a review in six months tied to specific goals, and funding for my certification?"

Why the strong version works: Market data gives an objective anchor. Offering a package of options addresses the manager's budget interest while meeting your interest in pay and growth.

COMMON MISTAKES

- Negotiating without knowing your walk-away point
- Accepting the first offer out of discomfort
- Making it personal: "You don't value me"
- Focusing only on price when terms, timing and extras matter too

PRACTICE THIS WEEK

Before your next negotiation, write down your BATNA, your target, and three things the other side might value that cost you little.

SOURCES

- Summary of *Getting to Yes* (Fisher & Ury)
- Galinsky & Mussweiler (2001), First offers as anchors, PubMed
- Columbia Business School (2013), asking a precise, not round, number during negotiations

Job interviews, raises and promotions

The conversations that shape your career follow patterns you can prepare for. Clear stories, good questions and solid evidence matter more than polish.

Questions

300+ CONVERSATIONS

make people like you
more

Asking follow-up questions increases liking

Harvard researchers analyzed hundreds of online and in-person conversations. People who asked more questions, especially follow-up questions, were rated as more likable. In speed dating, people who asked more questions were more likely to get a second date. Follow-ups signal that you're listening and interested.

Use it: In interviews, ask follow-up questions about what the interviewer says: "You mentioned the team is growing. What's driving that?"

Huang, Yeomans, Brooks, Minson & Gino, *Journal of Personality and Social Psychology*, 2017

"TELL ME ABOUT YOURSELF"

Present, past, future in about a minute: what you do now, the experience that got you here, and why this role is the next step. "I'm a staff accountant at a regional firm, where I handle month-end close for six clients. Before that, I ran the books for a family business through college. I'm looking for a senior role where I can work with larger clients."

BEHAVIORAL QUESTIONS

Answer "Tell me about a time..." questions with STAR: situation, task, action, result. Prepare five stories you can adapt: a problem you solved, a conflict, a failure, a leadership moment and a goal you exceeded.

QUESTIONS TO ASK THEM

"What does success look like in the first 90 days?" "What's the biggest challenge facing the team?" "How do you prefer your team to communicate?" "What do you enjoy most about working here?"

AFTER THE INTERVIEW

Send a thank-you email within 24 hours. Mention one specific thing you discussed and restate why you're a fit, in four or five sentences.

Prepare market salary data, a list of your results with numbers, and a specific figure. Time it after a win or before budgets are set. Open with: "I'd like to discuss my compensation. Here's what I've delivered this year."

Ask early: "What would I need to show to be considered for senior analyst in the next year?" Agree on specific goals, then check in on progress every quarter.

More competent

is how people saw those who asked them for advice

MULTIPLE EXPERIMENTS

Asking for advice makes you look smarter, not weaker

Alison Wood Brooks, Francesca Gino and Maurice Schweitzer found that people who asked for advice were seen as more competent than those who didn't. Being asked for advice is flattering, which makes the advisor think better of the person asking. The effect was strongest when the task was hard and the question was asked of someone with relevant expertise.

Use it: In career conversations, ask specific, thoughtful questions: "What did you focus on in your first year that made the biggest difference?" works better than "Any advice?"

Brooks, Gino & Schweitzer, *Management Science*, 2015

Structured

interviews predict job performance better than unstructured ones

META-ANALYSIS

Most good interviews follow a script, so prepare for one

A meta-analysis by Michael McDaniel and colleagues found that structured interviews, where every candidate gets the same job-related questions and is scored the same way, predicted job performance better than casual, unstructured conversations. That's why many employers now use behavioral questions like "Tell me about a time when..."

Use it: Prepare five or six STAR stories (Situation, Task, Action, Result) that show teamwork, conflict, leadership, failure and a measurable result. Most behavioral questions can be answered with one of them.

McDaniel, Whetzel, Schmidt & Maurer, *Journal of Applied Psychology*, 1994

ASKING FOR A RAISE

"I'd like to discuss my compensation. Over the past year I took on the vendor contracts and cut costs by \$40,000."

"Based on market data for this role, I'm asking for \$68,500."

"If that isn't possible now, what would I need to show to get there by the next review?"

ASKING FOR A PROMOTION

"I'd like to be considered for the senior analyst role. What gaps do you see between my work now and that role?"

"Could we set three goals for the next six months that would make the case clear?"

CLOSING AN INTERVIEW

"What would success look like in this role after 90 days?"

"Is there anything about my background that gives you pause? I'd like to address it."

"What are the next steps, and when should I expect to hear back?"

DEEP DIVE

Going further: Interviews & career talks

WHY IT WORKS

Interviewers and managers make decisions under uncertainty. Specific stories with measurable results reduce that uncertainty, and good questions show judgment and genuine interest. In raise and promotion conversations, objective evidence such as market data and documented results shifts the discussion from "what you want" to "what's fair."

BUSINESS SCENARIO

At the end of an interview, you're asked, "Do you have any questions for us?"

WEAK APPROACH

"No, I think you covered everything. Thanks!"

STRONG APPROACH

"Yes, two. You mentioned the team is moving to a new reporting system. What's been the hardest part of that change? And what would make someone really successful here in the first three months?"

Why the strong version works: The first question follows up on something they said, showing you listened. The second shows you're already thinking about doing the job well.

COMMON MISTAKES

- Reciting your résumé instead of telling a story
- No questions for the interviewer
- Asking for a raise based on personal needs instead of results
- Waiting for your manager to bring up a promotion

PRACTICE THIS WEEK

Write your one-minute "tell me about yourself" answer using present, past, future. Record yourself saying it and trim anything that doesn't support the role you want.

SOURCES

- CNBC (2017) on Huang et al., question-asking increases liking
- Quartz (2015) on Brooks, Gino & Schweitzer, asking for advice
- McDaniel et al. (1994), The validity of employment interviews: a meta-analysis

Hard conversations, saying no, and taking criticism

Missed deadlines, underperformance, client complaints and turning down requests are part of business. Handled well, they build trust instead of breaking it.

1 Prepare

Write down the facts, the impact, and the outcome you want. Pick a private time and place.

3 Describe, don't judge

Use SBI: "In the last two client updates, the numbers were sent after the deadline. The client called me asking where they were."

5 Solve together

"What would help you hit the deadline next time?"

2 Open neutrally

"I'd like to talk about the Henderson report. Is now a good time?"

4 Listen

"What's been going on from your side?" There may be a workload or process issue you don't know about.

6 Confirm in writing

Send a short recap of what you agreed and by when.

SAYING NO PROFESSIONALLY

"I can't take this on this week because I'm closing the audit. I could start Tuesday."

"If I take this, the client proposal slips to Friday. Which should come first?"

"Let me check my priorities and get back to you by 3."

"That's not something I can commit to, but Jordan has done this before."

RECEIVING CRITICISM

- Thank them, even if it stings: "Thanks for telling me."
- Ask for specifics: "Can you give me an example?"
- Don't defend right away; take a day if you need it
- Follow up with what you'll change

CALMING AN UPSET CLIENT

"I understand why you're frustrated. Let's fix this."

"Here's what happened, and here's what we're doing about it."

"I'll update you by 4 p.m. today, even if it's not resolved yet."

INTERACTIVE TOOL

Difficult conversation scripter

Use this tool on the Clear at Work website.

3

conversations happen
inside every difficult
conversation

HARVARD NEGOTIATION PROJECT

The facts, the feelings and your identity

Douglas Stone, Bruce Patton and Sheila Heen of the Harvard Negotiation Project found that every hard conversation is really three at once. **"What happened"**: who's right and who's to blame. **Feelings**: emotions that are often unspoken but drive everything. **Identity**: what this says about me ("Am I competent? Am I a good person?"). Most people focus only on the first, arguing about facts, while the other two quietly decide the outcome.

Use it: Shift from "who's right" to "how did we each see it?" and from blame to contribution: "Here's what I did that made this harder."

Stone, Patton & Heen, *Difficult Conversations*, 1999

INSTEAD OF	TRY
"You always miss deadlines."	"The last two reports came in after the deadline. What's getting in the way?"
"You're wrong about this."	"I see it differently. Can I walk you through how I got there?"
"Calm down."	"I can see this matters a lot to you."
"With all due respect..."	"I want to push back on one point."
"That's not my fault."	"Here's the part I own, and here's where I think things broke down."
"We need to talk." (and nothing else)	"Do you have 15 minutes today? I'd like to talk about how the handoff went."

TAKING CRITICISM WELL

When you're on the receiving end

1. **Pause before responding.** One breath keeps a defensive reaction from becoming the story.
2. **Thank them for raising it.** "Thanks for telling me. That wasn't easy to bring up."
3. **Ask for a specific example.** "Can you give me an example so I understand?"
4. **Separate the "what" from the "who."** Feedback about one report isn't a verdict on you.
5. **Decide later.** You don't have to agree in the moment. "Let me think about that and come back to you."

DEEP DIVE

Going further: Difficult conversations

WHY IT WORKS

Difficult conversations go wrong when people feel attacked, because a threatened person defends rather than listens. Describing specific behavior instead of character, and asking for their perspective, lowers the threat. A written follow-up matters because emotional conversations are often remembered differently by each person.

BUSINESS SCENARIO

A team member's reports keep arriving late, and a client has noticed.

WEAK APPROACH

In the team chat: "Can we please get reports in ON TIME going forward??"

STRONG APPROACH

In a private meeting: "The last three client reports came in after the deadline, and the client asked me about it yesterday. I want to understand what's happening. What's getting in the way?" Then agree on a fix and send a two-line recap.

Why the strong version works: Private, specific and curious. The person can explain without public embarrassment, and you may learn about a workload or process problem you can solve.

COMMON MISTAKES

- Addressing one person's problem in a group message
- Waiting until you're angry to raise it
- Opening with "You always..." or "You never..."
- Ending without a clear next step

PRACTICE THIS WEEK

Think of one conversation you've been avoiding. Write the first two sentences using SBI, and schedule the conversation.

SOURCES

- Beyond Intractability, summary of *Difficult Conversations* (Stone, Patton & Heen)

When to show feeling, and when to stay steady

Emotion isn't the enemy of professionalism. Enthusiasm wins buy-in, empathy calms clients, and honest concern gets problems fixed. But raw anger, panic or sarcasm can damage trust in seconds. The skill is matching how much feeling you show to the situation, and choosing words that name emotions instead of acting them out.

MYTH

"Professionals should keep all emotion out of work."

Hiding every feeling has costs. In one study, people who suppressed their emotions during a conversation communicated worse, built less rapport, and even raised their partner's blood pressure. The goal is managing emotion, not erasing it.

MYTH

"Getting angry shows strength and gets results."

Anger sometimes wins short-term concessions, but it carries risks: it can damage relationships, and research shows it's judged very differently depending on who expresses it. Calm, specific concern is usually safer and just as effective.

Contagious

CONTROLLED EXPERIMENT

one person's mood
spreads to the group

Your mood sets the room's mood

In a Yale study, a trained actor joined small groups and expressed different moods. When the actor was upbeat, the group's mood rose too. Those groups cooperated more, had less conflict, and rated their own performance higher.

Use it: As a meeting leader or manager, your energy spreads. Open with genuine optimism about the goal, and stay steady when things go wrong.

Barsade, *Administrative Science Quarterly*, 2002

Name it

to tame it

BRAIN IMAGING, SMALL STUDY

Putting feelings into words calms them

When people labeled the emotion on a face, such as "angry," activity in the amygdala, the brain's alarm center, dropped compared with other tasks. The researchers note the effect is likely modest, but it supports a practical habit: saying "I'm frustrated" helps you stay in control better than showing frustration.

Use it: Say the emotion calmly instead of acting it out: "I'm frustrated that the deadline moved again" beats a sigh, a slammed laptop or a sharp tone.

Lieberman et al., *Psychological Science*, 2007

"I'm excited"

beats "I'm calm" before
a big moment

THREE EXPERIMENTS

Turn nerves into excitement

Before giving a speech, people who said "I am excited" out loud were rated more persuasive, competent and confident than people who said "I am calm." Anxiety and excitement are both high-energy states, so reframing nerves as excitement is easier than forcing yourself to relax.

Use it: Before a presentation, interview or negotiation, tell yourself "I'm excited about this," not "Calm down."

Brooks, *Journal of Experimental Psychology: General*, 2014

Suppressing

hurts the conversation

TWO EXPERIMENTS

Bottling it up has a cost

When people suppressed their emotional reactions during a conversation about an upsetting topic, communication suffered, rapport dropped, and both partners' blood pressure rose. People who reframed the situation instead didn't show these costs.

Use it: Instead of stuffing feelings down, reframe them: "This setback means we found the problem before the client did."

Butler et al., *Emotion*, 2003

Concessions

more to angry
negotiators, with limits

CONTEXT-DEPENDENT

Anger can win concessions, but it's a risky tool

In negotiation experiments, people conceded more to an opponent who expressed anger than to a happy one, because they read anger as a sign the opponent was near their limit. But the effect depended on the situation and disappeared in some conditions. Anger also risks the relationship and future deals.

Use it: Rather than anger, express firm, measured disappointment: "I'm disappointed with this offer. It's well below what we discussed."

Van Kleef, De Dreu & Manstead, *Journal of Personality and Social Psychology*, 2004

Double standard

in how anger is judged

THREE LAB STUDIES

Explaining your emotion changes how it's received

In mock job interviews, angry men were rated higher in status, while angry women were rated lower in status, pay and competence. But when women explained the reason for their anger, the penalty almost disappeared. Giving the cause made the emotion read as a response to a situation, not a personality trait.

Use it: Anyone expressing strong emotion should name the reason: "I'm frustrated because this is the third missed shipment this month."

Brescoll & Uhlmann, *Psychological Science*, 2008

THE EMOTION DIAL

Four levels of emotional expression

Think of emotion as a dial, not an on/off switch. Most business moments call for the middle two settings.

1

Cool & factual

Neutral tone, facts and next steps only. For legal, HR, formal complaints, written records and moments when you're too angry to be measured.

2

Calm & measured

Steady tone with one named feeling: "I'm concerned." For negotiations, client problems, crises and tough feedback.

3

Warm & open

Visible empathy, appreciation and care. For bad news to individuals, support, apologies and one-on-ones.

4

All in

Full enthusiasm and passion. For celebrating wins, rallying a team, pitching a vision and thanking people.

WORDS THAT HELP AND HURT

Emotion words to use and avoid

Specific, owned emotion words keep conversations productive. Blaming, dismissive or exaggerated words escalate them. These are practical guidelines drawn from the research above and common professional practice.

USE

"I'm concerned that..."

Names worry without blame. Works in almost every setting.

"I'm frustrated because..."

Owens the feeling and gives the reason, which keeps it from reading as a personality trait.

"I'm disappointed with..."

Firm and measured. Strong in negotiations and performance talks.

"I'm excited about..."

Spreads energy and builds buy-in for ideas.

"I really appreciate..."

Specific thanks lands better than generic praise.

"That sounds really difficult."

Acknowledges someone else's feelings without trying to fix them right away.

"I need a moment to think about this."

Buys time when you're too heated to respond well.

Precise words

Uneasy, surprised, discouraged, proud, relieved. Specific words communicate more than "upset" or "mad."

AVOID

"You make me so..."

Blames the other person for your feelings and triggers defensiveness.

"Calm down" / "Relax"

Almost always makes upset people more upset.

"Don't be so emotional / sensitive"

Dismissive, and often heard as a personal attack.

"Whatever" / "Fine."

Signals contempt or shutting down.

"I'm furious" / "This is a disaster"

Extreme words escalate. Say what happened and its impact instead.

"It's not a big deal"

Minimizes something that clearly matters to the other person.

"This is the BEST thing EVER!!!"

Over-the-top enthusiasm in writing can read as insincere. Be specific about what's good.

Sarcasm

Comes across as hostile, especially in writing.

WHEN EMOTIONS RUN HIGH

A four-step reset before you respond

1. **Pause.** Take a breath, or say "Let me think about that for a moment." Avoid replying to emails while you're angry; wait, or at least sleep on it.
2. **Name it to yourself.** "I'm feeling defensive because this criticism surprised me."
3. **Reframe it.** "This feedback is information, not an attack." Before a big moment: "I'm excited."
4. **Choose your dial setting.** Then express one owned feeling, the reason, and what you need: "I'm concerned because the client expects this Friday. Can we talk about what's realistic?"

DEEP DIVE

Going further: Emotion at work

WHY IT WORKS

Emotions carry information: they tell others what matters to you and how serious a situation is. That's why showing some feeling makes people take you seriously, and why suppressing everything erodes connection. But high-intensity emotions like anger also signal threat, which puts listeners on the defensive. Naming an emotion instead of acting it out gives people the information without the threat, and explaining the reason makes it read as a response to the situation rather than a flaw in your character.

BUSINESS SCENARIO

A vendor delivers the wrong order for the third time, right before a client event.

WEAK APPROACH

On the phone, raising your voice: "This is ridiculous! You people can't get anything right. I'm done with you!"

STRONG APPROACH

"I'm frustrated, because this is the third incorrect order this quarter and our client event is tomorrow. I need the correct items here by 9 a.m. What can you do to make that happen? And let's schedule a call next week about whether this partnership is working."

Why the strong version works: It names the emotion and the reason, makes the stakes clear, asks for a specific fix, and raises the bigger issue without burning the relationship in the moment.

COMMON MISTAKES

- Sending an email while angry
- Hiding all emotion, so you seem cold or unreadable
- Gushing in writing until praise sounds insincere
- Telling upset people to calm down
- Showing strong emotion without saying why

PRACTICE THIS WEEK

The next time you feel a strong reaction at work, say one sentence using "I'm [emotion] because [reason]" instead of reacting. Notice how the other person responds.

SOURCES

- Barsade (2002), The ripple effect: emotional contagion and its influence on group behavior
- ScienceDaily (2007) on Lieberman et al., putting feelings into words
- American Psychological Association on Brooks (2014), reappraising anxiety as excitement
- Butler et al. (2003), The social consequences of expressive suppression
- Van Kleef, De Dreu & Manstead (2004), The interpersonal effects of anger and happiness in negotiations
- Harvard Gender Action Portal on Brescoll & Uhlmann (2008), Can an angry woman get ahead?

How to call out a problem, and keep it from becoming an argument

Sometimes you have to tell someone their behavior isn't okay: a colleague takes credit for your work, a client keeps adding scope, a teammate talks over you, or a manager sets an impossible deadline. Saying nothing builds resentment. Exploding damages the relationship. There's a middle path that is firm, specific and respectful, and research shows how to find it.

Sweet spot

too little or too much
assertiveness both hurt

MULTIPLE STUDIES

Be firm enough to be heard, not so firm you're resented

In research on leaders, coworkers named assertiveness as a weakness more often than almost any other trait, split nearly evenly between "too much" and "too little." People who were too passive couldn't get results. People who were too forceful got their way short term but damaged relationships, which eventually hurt their results too. The most effective leaders could turn assertiveness up or down depending on the situation.

Use it: Match your firmness to the stakes. A one-time slip gets a light touch; a repeated problem gets a direct, private conversation.

Ames & Flynn, *Journal of Personality and Social Psychology*, 2007

Receptive

language lowers
conflict

MULTIPLE STUDIES

Showing you've heard them keeps disagreements civil

Harvard researchers studied how people disagree. When government executives used "receptive" language during heated policy discussions, their partners rated them as better teammates and advisors. On Wikipedia, receptive opening messages predicted fewer personal attacks later in the conversation. People taught to write receptively were seen as more persuasive and more desirable to work with. The researchers' practical summary is HEAR: Hedge your claims, Emphasize agreement, Acknowledge the other view, Reframe positively.

Use it: Before stating your view, restate theirs and name what you agree on: "You want to protect the budget, and so do I. Where I see it differently is..."

Yeomans, Minson, Collins, Chen & Gino, *Organizational Behavior and Human Decision Processes*, 2020

First 3 min

the opening shapes the outcome

COUPLES RESEARCH, APPLIED BY ANALOGY

How you start decides how it ends

Psychologist John Gottman's lab observed couples discussing disagreements and found that conversations opening with criticism or sarcasm, which he calls a "harsh startup," tended to end badly. He reports the outcome could be predicted from the first three minutes. This research is about couples, not coworkers, but the lesson carries: a calm, specific opening gives the conversation its best chance.

Use it: Plan your first sentence. Open with the shared goal and a fact, never an accusation.

Gottman Institute, summarizing research with 130 newlywed couples

THE RESPECTFUL PUSHBACK

Five steps to call out a problem

1 Pick the moment

Private, soon after it happens, and when you're calm. Not in front of others, and not over chat.

3 State the fact and impact

"In Tuesday's meeting, the forecast was presented as your work. I built most of it, and it left me feeling overlooked."

5 Listen and agree

"How do you see it?" Then confirm: "So we'll co-present the Q4 update. Thanks for hearing me out."

2 Open with shared ground

"I want this project to go well for both of us, so I want to raise something."

4 Make a clear request

"Going forward, I'd like us to present shared work together, or credit each other by name."

ESCALATION LADDER

Start at the lowest step that works

Most problems are solved on the first or second step. Move up only if the behavior continues.

1 Light touch, in the moment

"I'd like to finish my point, then I want your take." Calm, brief, then move on.

2 Private conversation

Use the five steps above. Most patterns end here.

3 Written follow-up

A short, factual email recapping what you agreed. It creates a record without drama.

4 Involve your manager or HR

If it continues, or for harassment, discrimination or safety issues, which go straight to this step. Bring dates and examples.

REAL SITUATIONS

Telling someone off, respectfully

ARGUMENT STARTER

~~"You always interrupt me. It's so rude."~~

RESPECTFUL PUSHBACK

"I've noticed I've been cut off a few times in our meetings. I'd like to finish my points, and then I really want to hear yours."

Replaces "always" and a personality label with a specific observation and a request.

ARGUMENT STARTER

~~"Are you seriously taking credit for my work?"~~

RESPECTFUL PUSHBACK

"I want to make sure we're aligned on credit. I built most of the forecast, so going forward I'd like us to present shared work together."

A rhetorical question invites defense. A statement of fact plus a request invites agreement.

ARGUMENT STARTER

~~"That's not in the contract, and you know it."~~

RESPECTFUL PUSHBACK

"I'm glad you want to expand the project. That piece falls outside our current scope, so I'll send a quote for it by Thursday."

With clients, protect the relationship and the boundary at the same time.

ARGUMENT STARTER

~~"This deadline is ridiculous. There's no way."~~

RESPECTFUL PUSHBACK

"I want to hit this deadline. To do it, I'd need to pause the audit prep or get help from Jordan. Which would you prefer?"

Pushing back on your manager works best as a trade-off question, not a refusal.

ARGUMENT STARTER

~~"Your email was really unprofessional."~~

RESPECTFUL PUSHBACK

"Your email this morning felt sharp to me, and I want to make sure we're okay. Can we talk it through for five minutes?"

"Felt sharp to me" owns your reaction instead of judging theirs.

AVOIDING ARGUMENTS

Spot an argument forming, and steer out of it

WARNING SIGNS

- Voices getting louder or faster
- Repeating the same point
- "Always" and "never" appear
- Interrupting each other
- It turns personal: "you people," "your attitude"
- Trying to win instead of solve

DE-ESCALATION MOVES

- Lower your volume and slow down
- Name what you agree on
- Ask a genuine question: "What's your biggest concern?"
- Restate their point until they say "yes, exactly"
- Shift from past to future: "What do we do next time?"
- Pause: "Let's take ten minutes and come back to this."

PICK YOUR BATTLES

- Will this matter in a week?
- Is it a pattern or a one-time slip?
- Does it affect results, clients or fairness?
- Is now the right time and place?
- For low stakes, "We see this differently, and that's okay" is a fine ending.

USE

"I see it differently."

Disagrees without declaring the other person wrong.

"Help me understand..."

Invites explanation instead of defense.

"We both want..."

Emphasizes the shared goal before the disagreement.

"What if we..."

Turns criticism into a proposal.

"I noticed..."

Starts with an observation, not a judgment.

"I'd like..." / "Going forward..."

Makes a clear, future-focused request.

"It might be that..."

A light hedge keeps the conversation open.

AVOID

"You're wrong." / "That's ridiculous."

Forces the other person to defend themselves.

"Why would you...?"

Sounds like an accusation, not a question.

"No offense, but..." / "With all due respect..."

Signals that offense and disrespect are coming.

"You always..." / "You never..."

Invites an argument about the exception.

"Calm down."

Escalates almost every time.

"Whatever." / "Fine."

Signals contempt and shuts the conversation down.

"Actually..." (to correct)

Often heard as condescending. State the fact plainly.

INTERACTIVE TOOL

Pushback builder & argument check

Use this tool on the Clear at Work website.

DEEP DIVE

Going further: Pushing back without a fight

WHY IT WORKS

Arguments start when people feel attacked and switch from solving the problem to defending themselves. Facts are hard to argue with; judgments invite debate. Naming a shared goal signals you're on the same side, a specific request gives the person a clear way to fix things, and asking for their view shows you might be missing something. Together, they turn a confrontation into a joint problem to solve.

BUSINESS SCENARIO

A colleague keeps sending you their work at 5 p.m. with "urgent" in the subject line.

WEAK APPROACH

Either saying nothing and working late again, or replying: "Stop dumping your work on me at the last minute."

STRONG APPROACH

"I want to help you hit your deadlines. I've noticed the last three urgent requests came after 5, and I couldn't give them my best. Could you send them by 2 p.m.? If something truly can't wait, a quick heads-up earlier in the day would help."

Why the strong version works: It opens with a shared goal, uses a specific pattern instead of "always," explains the impact on quality, and makes a request with a reasonable exception.

COMMON MISTAKES

- Waiting until you're furious to say anything
- Calling someone out in public or in a group chat
- Hinting instead of asking directly
- Arguing about intent ("you did it on purpose") instead of impact
- Trying to win instead of solve

PRACTICE THIS WEEK

Think of one small, recurring annoyance at work. Use the pushback builder to write your script, then have the conversation at step 1 or 2 of the ladder.

SOURCES

- American Psychological Association on Ames & Flynn (2007), assertiveness and leadership
- Harvard Kennedy School, Yeomans et al. (2020), Conversational receptiveness
- Harvard Program on Negotiation on the HEAR framework
- The Gottman Institute on harsh startup

Structures for tricky moments

When you're nervous, a simple structure keeps you on track. These four are widely used in business settings.

SBI

Giving feedback

1. **Situation:** when and where
2. **Behavior:** what you observed
3. **Impact:** the effect it had

"In Monday's client call, you interrupted the client twice. They seemed frustrated and cut the call short."

BLUF

Updates and requests

1. The bottom line or ask
2. Key supporting facts
3. Background, if needed

"We'll miss the launch date by one week. The vendor shipped late; here's the new plan."

STAR

Interviews and reviews

1. **Situation:** the context
2. **Task:** your responsibility
3. **Action:** what you did
4. **Result:** the outcome, with numbers

Use it to tell a short, believable story about your work.

PREP

Speaking off the cuff

1. **Point:** your answer
2. **Reason:** why
3. **Example:** a proof
4. **Point:** restate it

Useful when someone asks your opinion in a meeting without warning.

BLUF

"Bottom line up front," a U.S. Army writing standard

LONG-STANDING STANDARD

Put the conclusion first

U.S. Army writing guidance (Army Regulation 25-50) asks writers to put the main point in the first lines, then the supporting details: "bottom line up front." The approach has spread widely in business because busy readers often stop after the first paragraph. Consultant Barbara Minto's "Pyramid Principle," taught at McKinsey, makes the same argument: start with the answer, then group your reasons beneath it.

Use it: Before any update, write your bottom line as one sentence. Start with it. "We'll miss the March 1 launch by one week; here's why and what we're doing."

Army Regulation 25-50; Minto, *The Pyramid Principle*

FRAMEWORK	USE IT FOR	EXAMPLE
SBI (Situation, Behavior, Impact)	Feedback	"In Tuesday's client call (S), you interrupted the client twice (B). She seemed frustrated and cut the call short (I)."
STAR (Situation, Task, Action, Result)	Interview answers, reviews	"Our biggest client was about to leave (S). I had to keep them (T). I set up weekly check-ins (A). They renewed for two years (R)."
BLUF (Bottom line up front)	Updates, emails, briefings	"Bottom line: we need \$5K more. Details below."
PREP (Point, Reason, Example, Point)	Speaking off the cuff	"We should delay (P). The data isn't ready (R). Last time we rushed, we reissued the report (E). So let's delay a week (P)."
What, So what, Now what	Reports, debriefs	"Returns rose 12% (what). It's eating our margin (so what). Let's fix sizing info (now what)."
SCQA (Situation, Complication, Question, Answer)	Proposals, strategy	"We've grown 20% a year. Costs are rising faster. How do we protect margin? Renegotiate the top three contracts."

CHOOSING THE RIGHT ONE

- **Someone needs to act:** BLUF
- **Someone needs to change a behavior:** SBI
- **Someone asked you a surprise question:** PREP
- **Someone is judging your experience:** STAR
- **Someone needs to be convinced:** SCQA

DEEP DIVE

Going further: Frameworks

WHY IT WORKS

Frameworks reduce the mental load of high-pressure moments. When you're nervous, structure keeps you from rambling or forgetting key parts. They also help listeners, because a familiar shape like problem, point and evidence is easier to follow.

BUSINESS SCENARIO

In a job interview you're asked: "Tell me about a time you solved a problem."

WEAK APPROACH

"I'm a really good problem solver. I always try to think outside the box and work well with others."

STRONG APPROACH

(STAR) "At my last job, our invoice error rate was rising (situation). I was asked to find the cause (task). I traced most errors to a manual data entry step and built a spreadsheet template with validation (action). Errors dropped by more than half within two months (result)."

Why the strong version works: Concrete stories with a measurable result are believable and memorable. Generic claims are neither.

COMMON MISTAKES

- Reciting a framework so rigidly it sounds scripted
- Skipping the result or impact
- Using SBI to vent rather than to improve
- Forgetting the framework under pressure because you never practiced it

PRACTICE THIS WEEK

Write three STAR stories from your work or studies: a problem you solved, a conflict you handled, and a goal you exceeded.

SOURCES

- BLUF (communication), overview and Army Regulation 25-50 background
- James Madison University, Writing in the Army style (BLUF)

PART 5

Workplace relationships

Communicating across age, gender and culture with colleagues, managers and clients, without stereotypes.

- | | |
|------------------------------------|-----------------------------------|
| 1. Networking & small talk | 4. Gender |
| 2. Age gaps | 5. Cross-cultural business |
| 3. Communicating with young people | 6. Apologizing & rebuilding trust |
| | 7. Communicating as a new manager |

Networking without the awkwardness

Networking is simply building professional relationships before you need them. Most people find it uncomfortable, but research shows the people you meet like you more than you think, and casual connections can matter more than close ones.

20M+

LinkedIn users in a five-year experiment

LARGE FIELD EXPERIMENT

Weak ties open doors

A study of more than 20 million LinkedIn users over five years, covering 600,000 new jobs, found that weaker connections helped people change jobs more than strong ones, up to a point. Acquaintances connect you to information and opportunities your close circle doesn't have. The effect was stronger in tech-heavy industries.

Use it: Stay in light touch with acquaintances: congratulate them on news, share a useful article, say hello at events.

Rajkumar et al., *Science*, 2022

Liking gap

they like you more than you think

MULTIPLE STUDIES

We underestimate how much people enjoy talking to us

After conversations with strangers, people consistently underestimated how much their partner liked them. They focused on their own awkward moments and missed the other person's signals of interest. The gap appeared in short chats, longer conversations and even among roommates over months.

Use it: After an event, assume the conversation went better than it felt. Send that follow-up message.

Boothby, Cooney, Sandstrom & Clark, *Psychological Science*, 2018

STARTING CONVERSATIONS

"Hi, I'm Alex. How do you know the host?"

"What brought you to this event?"

"What are you working on these days that you're excited about?"

"I saw your talk on cash flow. How did you get into that area?"

KEEPING IT GOING

- Ask follow-up questions about what they just said
- Share something about yourself in return so it isn't an interview
- Listen for ways you can help: an introduction, an article, a resource
- Topics that usually work: work, recent projects, travel, local events, the event itself

EXITING GRACEFULLY

"It was great meeting you. I'm going to say hello to a few more people. Can I connect with you on LinkedIn?"

"I don't want to keep you. Let's continue this over coffee next week."

"Have you met Jordan? You two should talk about pricing."

GENERIC FOLLOW-UP Hi, nice meeting you last night. Let's keep in touch!	MEMORABLE FOLLOW-UP Hi Priya, great talking with you at the Chamber mixer about switching bookkeeping software. Here's the comparison article I mentioned. If you're open to it, I'd love to hear how the switch goes. Coffee in a few weeks?
Send within 48 hours. Mention where you met and what you discussed, deliver something useful, and suggest a light next step.	
BLANK LINKEDIN REQUEST {No message}	PERSONAL NOTE Hi Marcus, I enjoyed your panel on small business finance at the Regional Business Expo. I'm a staff accountant moving into advisory work and would love to stay connected.
A one or two sentence note saying where you met or why you're reaching out makes acceptance far more likely.	

INTERACTIVE TOOL

Elevator pitch builder

Use this tool on the Clear at Work website.

DEEP DIVE

Going further: Networking & small talk

WHY IT WORKS

Networking works through trust and information flow. People help those they know and like, and acquaintances move in different circles, so they hear about opportunities you won't. Small talk is the on-ramp: low-stakes questions let both people find common ground before any business comes up. Giving help first, like an introduction or a useful article, builds goodwill that makes later requests natural.

BUSINESS SCENARIO

At a business mixer, someone asks, "So, what do you do?"

WEAK APPROACH

"Oh, I'm just a student. I do some bookkeeping on the side." Then silence.

STRONG APPROACH

"I'm a bookkeeper and accounting graduate student. I help small businesses keep clean books; I recently helped a café cut their month-end close from ten days to three. What about you?"

Why the strong version works: No shrinking words, a concrete result people remember, and a question that hands the conversation back.

COMMON MISTAKES

- Leading with an ask before building any relationship
- Talking only about yourself
- Collecting business cards and never following up
- Only networking when you need a job

PRACTICE THIS WEEK

Send a short, specific message to two acquaintances you haven't talked to in a while: congratulate them, share something useful, or ask about a project.

SOURCES

- [EurekAlert \(2022\) on Rajkumar et al., a causal test of the strength of weak ties](#)
- [MIT Initiative on the Digital Economy on the LinkedIn weak ties study](#)
- [ScienceDaily \(2018\) on Boothby et al., the liking gap](#)

An age gap isn't the wrench. Assumptions are.

Working with people much older or younger than you is normal, and it can be a real strength. Friction usually comes from stereotypes, talking down, or not knowing how to address someone. Here's what research says, and how to address people and hold your ground at any age.

MYTH

~~"Millennials want X, Boomers want Y, Gen Z wants Z."~~

A 2020 National Academies report found generational labels aren't supported by research as a way to understand workers. People within one generation differ about as much as people across generations. Differences are better explained by age, career stage and life circumstances, and the labels themselves can fuel bias.

MYTH

~~"Older workers are slower, harder to train and resistant to change."~~

A review of about 120 studies found little support for these beliefs. Performance often stays level or improves with age, and differences within an age group are far bigger than differences between groups. Older workers did tend to have better attendance and lower turnover.

~8,000

employees in 61
companies studied

LARGE FIELD STUDY

Younger boss, older team: the gap can create tension

In a German study, about a quarter of manager relationships had a younger manager. The bigger the gap between a younger manager and older employees, the more anger and frustration employees reported, and companies with more of these emotions performed worse. Hiding the feelings reduced the effect on paper but not the underlying problem.

Use it: If you manage older colleagues, name their experience openly, ask for their input before decisions, and make room for disagreement. Don't pretend the gap isn't there.

Kunze & Menges, *Journal of Organizational Behavior*, 2017

55% vs 26%

pushback with
patronizing talk vs
normal talk

SMALL STUDY, CARE SETTING

Talking down triggers pushback

In a nursing home study, residents resisted care in about 55% of interactions when staff used "elderspeak," the sing-song, overly simple talk with terms like "honey." With normal adult conversation, it dropped to about 26%. The setting was specialized, but the lesson travels: people of any age resist being talked down to.

Use it: Speak to every colleague as a capable adult. No "sweetie," "kiddo," or "young lady," and no over-explaining technology to older coworkers unless they ask.

Williams, Herman, Gajewski & Wilson, *American Journal of Alzheimer's Disease*, 2009

YOUR SITUATION

How to address people and hold your ground

Pick the situation closest to yours.

HOW TO ADDRESS THEM

- Use the name they introduce themselves with. If unsure, ask: "Do you prefer Robert or Bob?"
- With older clients or customers in formal settings, start with Mr. or Ms. plus last name until they invite you to use their first name.
- Inside most U.S. offices, first names are normal for everyone, including senior leaders. Follow what colleagues do.

PHRASES THAT WORK

"I'd value your experience on this. Here's my proposal."

"You've seen more of these than I have. What would you watch out for?"

"I'd like to finish this thought, and then I want your take."

"I recommend we..." (not "I'm probably wrong, but...")

AVOID

- Over-apologizing or asking permission to speak
- Calling them "sir" or "ma'am" constantly in a casual office; it can feel distancing
- Assuming they're bad with technology
- "OK boomer" or jokes about age

Confidence comes from preparation, not age

1. **Bring evidence.** Data, examples and a clear recommendation carry weight regardless of who presents them.
2. **Acknowledge experience without deferring.** "You've seen more of these launches than I have. Here's what's different this time."
3. **Drop the shrinking words.** No "I'm probably wrong, but" or "this is just a thought." State it, then invite input.
4. **Handle interruptions calmly.** "I'd like to finish this point, and then I really want your take."
5. **Redirect age comments to the work.** If someone says "You're too young to remember...", smile and say "Fair. Let's look at what the numbers show now."
6. **Ask questions that honor their knowledge.** "What went wrong the last time we tried this?" builds alliances and makes your idea stronger.

Signs that it's bias, not a misunderstanding

Most age friction can be fixed with a direct conversation. But if someone is repeatedly excluded, passed over, or mocked because of their age, that's a bigger issue. Keep notes with dates and examples, raise it with your manager or HR, and know that in the U.S. the Age Discrimination in Employment Act protects workers age 40 and older. This isn't legal advice; an HR professional or attorney can tell you what applies to your situation.

- Asking how someone prefers to be addressed
- Valuing experience and fresh perspective equally
- Pairing people across ages to learn from each other
- Judging ideas on their merits
- "OK boomer" or "back in my day"
- Assuming tech skills based on age
- Jokes about retirement or being "a kid"
- Skipping someone for training or projects because of age

DEEP DIVE

Going further: Age gaps

WHY IT WORKS

Age friction mostly comes from assumptions: that older colleagues resist change, that younger ones lack commitment, or that a younger boss hasn't earned authority. These assumptions shape how people speak to each other, which then triggers defensiveness. Treating people as individuals and openly valuing what each brings removes the trigger.

BUSINESS SCENARIO

A 26-year-old manager inherits a team that includes a 58-year-old senior analyst who has been there 20 years.

WEAK APPROACH

The new manager avoids the analyst, changes processes without asking, and over-asserts authority in meetings.

STRONG APPROACH

In the first week, the manager meets one on one: "You know this business better than anyone. What's working, what should change, and how do you like to get updates?" They credit the analyst's input publicly when changes are made.

Why the strong version works: Asking for input and giving credit acknowledges experience without giving up the decision. It turns a potential rival into an ally.

COMMON MISTAKES

- Assuming tech skills or ambition based on age
- Generational jokes, even friendly ones
- Over-explaining to older colleagues or over-managing younger ones
- Avoiding the conversation entirely

PRACTICE THIS WEEK

Ask a colleague from a different age group for advice on a work problem this week. Notice what perspective they bring that you didn't have.

SOURCES

- National Academies (2020), generational categories in the workforce
- Campion testimony to the EEOC on age stereotypes research (2009)
- BPS Research Digest on Kunze & Menges (2017)
- Williams et al. (2009), Elderspeak communication and resistiveness to care

Different, not lesser: talking with teens and young adults as equals

Teen employees, interns, students and young customers are part of business life. Their communication style can look different: shorter messages, newer slang, less formal habits. It's easy to mistake that style for a lack of substance. Research shows young people often think as clearly as adults, process information faster, and may know things the adults in the room don't. Communicating with them as equals gets better ideas, better work and more trust.

MYTH

~~"Young people can't think at an adult level."~~

A study of more than 5,000 people in 11 countries found that cognitive capacity, the ability to reason through problems, reaches adult levels around age 16. What's still developing is emotional self-regulation in high-pressure moments, not intelligence.

MYTH

~~"Being younger means knowing less."~~

Young people often know more about new technology, platforms, current trends and recent coursework than experienced adults do. Different experience isn't less knowledge. It's knowledge the adults may not have.

18–19

the age raw processing
speed peaks

NEARLY 50,000 PARTICIPANTS

Some thinking skills peak young

MIT and Harvard researchers found that different mental skills peak at different ages. Raw speed of processing information peaked around 18 or 19, and short-term memory kept improving until about 25. Other skills, like vocabulary and reading other people's emotions, peaked much later, in middle age.

Use it: Young colleagues may take in information faster than you do, while you may bring more vocabulary and emotional reading. That's a strong pairing, not a hierarchy.

Hartshorne & Germine, *Psychological Science*, 2015

Maturity gap

reasoning at 16, self-regulation later

11 COUNTRIES, 5,227 PEOPLE

Sharp thinking, still-developing impulse control

Cognitive capacity reached adult levels around 16, but psychosocial maturity, like resisting peer pressure and controlling impulses under stress, kept developing past 18. In calm, unhurried conversations, teens reason like adults. Under time pressure, strong emotion or peer pressure, the gap shows more.

Use it: Hold important conversations in calm settings and give time to think before a decision. Avoid putting young people on the spot in front of a group.

Icenogle et al., *Law and Human Behavior*, 2019

27% →
64%

revised their work after
"wise feedback"

RANDOMIZED EXPERIMENT

High standards plus belief in them

Seventh graders received critical feedback on essays with one of two notes. The standard note said the comments were "feedback on your paper." The other said: "I'm giving you these comments because I have very high expectations and I know that you can reach them." Among students who tended to distrust school, that one sentence raised the share who revised their work from 27% to 64%.

Use it: When giving a young employee or intern critical feedback, say why: you have high standards, and you believe they can meet them.

Yeager et al., *Journal of Experimental Psychology: General*, 2014

Respect

beats lecturing

FIELD EXPERIMENT

Speak to their values, not down to them

Telling teens what's "good for them" often fails. In one study, researchers instead framed healthy eating as standing up to manipulative food marketing, which tapped into teens' values of independence and fairness. Eighth graders then chose healthier snacks and drinks, even when they didn't know anyone was watching.

Researchers reviewing why many programs for teens fail concluded that the ones that work tap into adolescents' heightened sensitivity to status and respect, instead of telling them what to do.

Use it: Explain the "why" in terms of what they care about: autonomy, fairness, being taken seriously, and making a real contribution.

Bryan et al., *Proceedings of the National Academy of Sciences*, 2016

Expectation

LONGITUDINAL STUDY, 250+ FAMILIES

can become reality

What adults expect, teens may live up to

In a study that followed more than 250 middle schoolers and their mothers for a year, mothers who expected their teens to be rebellious and take risks had teens who reported more risk-taking a year later, even after accounting for other factors. The researchers suggest negative stereotypes can work like a self-fulfilling prophecy. It's an association, not proof of cause, but the pattern matches decades of research on expectations.

Use it: Expect professionalism and capability from young people, and say so. Low expectations often become the ceiling.

Buchanan & Hughes, *Journal of Research on Adolescence*, 2009

Peers

change teen decisions,
not adult ones

BRAIN IMAGING EXPERIMENT

An audience changes how teens decide

In a simulated driving game, teens and adults took similar risks when playing alone. When friends were watching, only the teens took more risks, and reward areas of their brains became more active. Being seen by peers makes the social payoff of a choice feel bigger at this age.

Use it: Have important conversations one on one, not in front of their peers. Ask for decisions privately, and recognize good work in ways that make them look capable in front of others.

Chein, Albert, O'Brien, Uckert & Steinberg, *Developmental Science*, 2011

94

studies on choice with
structure

META-ANALYSIS

Choices within clear expectations drive engagement

A review of 94 studies found that when teachers supported students' autonomy, by explaining reasons, offering choices and acknowledging their perspective, students felt more capable and more engaged. Clear structure, meaning expectations and guidance, worked alongside autonomy rather than against it. The best results came from combining the two.

Use it: Set clear goals and deadlines, then let young people choose how to get there: "The summary is due Friday and needs these three points. How you organize it is up to you."

Meta-analysis, *Educational Psychology Review*, 2025

TALKING AS EQUALS

Seven habits for high-level conversations with young people

- 1

Ask before you tell
"How would you approach this?" Their answer often reveals knowledge you didn't expect.
- 2

Separate style from substance
A short message or casual phrasing isn't a short thought. Listen for the idea.
- 3

Give the real context
Share the full reasoning behind decisions, the same way you would with an adult colleague.
- 4

Credit their ideas by name
"That came from Jordan's suggestion." Public credit shows their input counts.
- 5

Let them teach you
Ask them to show you a tool, platform or trend. Being the expert builds confidence.
- 6

Give time to think
"No need to answer now. Send me your thoughts tomorrow." Calm settings bring out their best reasoning.
- 7

Hold real standards
Equal treatment means honest feedback and real responsibility, not lowered expectations.

WHAT YOUNG PEOPLE BRING

Strengths to look for and use

Every person is different, so treat these as possibilities to notice, not assumptions to make.

SPEED

Processing speed peaks in the late teens. Many young people take in new information and switch between tasks quickly.

DIGITAL FLUENCY

Often first to know new apps, platforms and shortcuts, and comfortable learning new tools without a manual.

CURRENT KNOWLEDGE

Recent coursework, new research and up-to-date methods from school that experienced staff may not have seen.

CUSTOMER INSIGHT

A direct line to how younger customers think, shop, search and talk, which is valuable market knowledge.

FRESH QUESTIONS

Asking "why do we do it this way?" can expose outdated habits everyone else stopped noticing.

COMFORT WITH CHANGE

Less attached to "how it's always been done," which helps when a team needs to adapt.

CHOICE WITHIN STRUCTURE

Give direction without taking control

CONTROLLING "Do it this way, and have it on my desk by 3."	CHOICE WITHIN STRUCTURE "We need this by 3 because the client call is at 4. It has to cover pricing and timing. Want to do a one-pager or a quick slide?"
Same deadline and standards, plus a reason and a real choice.	
CONTROLLING "Because I said so."	CHOICE WITHIN STRUCTURE "Here's why this rule exists: we had a data breach two years ago. If you see a better way to protect client files, tell me."
Explaining the reason turns a rule into a shared goal.	
DISMISSING FEELINGS "It's not a big deal. Just move on."	ACKNOWLEDGING "I get that this feels unfair. Here's what I can change and what I can't."
Acknowledging their view keeps them engaged, even when the answer is no.	

BRIDGING THE TEXTING GAP

Same message, different reading

In one study, text replies like "Okay." with a period were rated as less sincere than the same reply without one. Habits like this vary by person, but these are common places where messages between age groups get misread.

HABIT	HOW IT MAY READ TO A YOUNGER PERSON	HOW IT MAY READ TO AN OLDER PERSON	BRIDGE IT
"Okay." with a period	Cold, annoyed or final	Normal, correct punctuation	In quick replies, add warmth: "Okay, sounds good!"
"k"	Dismissive or irritated	Efficient	Write the full word or a full phrase
👍 alone	Can feel curt or passive-aggressive	Friendly approval	Pair it with words: "Looks great 👍"
Unscheduled phone call	Intrusive or alarming	Normal and efficient	Text first: "Got five minutes for a call?"
All lowercase, no punctuation	Casual and relaxed	Careless or unprofessional	Match the setting: standard style for clients and managers
Abbreviations (lmk, np, tbh)	Normal shorthand	Unclear or too casual	Spell out in work email; fine in team chat if others use them
Slow reply	Upset or uninterested	Busy, nothing personal	Agree on expected response times

The period finding comes from a small study of college students. The other rows reflect commonly reported differences, not universal rules. When unsure, ask how someone prefers to communicate.

QUESTION BANK

Questions that open high-level conversations with young people

"What's something you know a lot about that most people here don't?"

"If you ran this project, what would you change first?"

"What tools or apps do you think we should be using?"

"How would someone your age find a business like ours?"

"What did you learn in school that would help us here?"

"What's the part of this job that seems most confusing from the outside?"

INTERACTIVE TOOL

Speak as equals

Use this tool on the Clear at Work website.

TALKING DOWN

"You're too young to understand how this works."

TALKING AS EQUALS

"Here's the background on why we do it this way. What's your take?"

Context invites contribution; dismissal shuts it down.

TALKING DOWN

~~"When you've been here as long as I have, you'll see."~~

TALKING AS EQUALS

"I've seen this tried before, and here's what happened. Is there something different about your approach?"

Share experience as information, not as a trump card.

TALKING DOWN

~~"Good job, kiddo!"~~

TALKING AS EQUALS

"Your summary cut the report from ten pages to two, and the client loved it."

Specific, professional praise, the same as you'd give anyone.

TALKING DOWN

~~"Let me explain this really slowly."~~

TALKING AS EQUALS

"Here's the short version. Stop me if you want more detail on any part."

Let them set the pace; over-explaining signals you doubt them.

TALKING DOWN

~~"That's just a phase. Everyone your age thinks that."~~

TALKING AS EQUALS

"That's an interesting view. What led you to it?"

Engage with the idea, not the age of the person who said it.

Professional boundaries with minors at work: When working with employees, interns or customers under 18, keep communication on work channels and in open, professional settings. Don't connect through personal social media or private messages, follow your organization's youth policies and labor laws, and involve a supervisor, school or guardian when appropriate. Respectful, equal communication and clear professional boundaries go together.

DEEP DIVE

Going further: Communicating with young people

WHY IT WORKS

Young people are especially sensitive to status and respect. Being talked down to signals low status, which shuts down effort and honesty. Being treated as a capable contributor does the opposite. Because their reasoning is already strong but their self-regulation under pressure is still developing, the best results come from calm settings, real context, high expectations and genuine belief in their ability.

BUSINESS SCENARIO

A 17-year-old part-time employee suggests the store should promote its products on a social platform you've barely heard of.

WEAK APPROACH

"That's just a fad. Focus on stocking the shelves."

STRONG APPROACH

"I don't know much about that platform. Can you show me how other local businesses use it? If you put together a one-page idea, I'll bring it to the owner and make sure your name is on it."

Why the strong version works: It admits a knowledge gap, invites them to teach, gives a real assignment with a clear format, and promises credit.

SECOND SCENARIO

A 19-year-old intern made an error in a spreadsheet that went to a client.

WEAK APPROACH

In the team meeting: "This is why we don't let interns touch client files."

STRONG APPROACH

One on one: "The totals in column F were off, and the client caught it. I'm telling you because I hold you to the same standard as everyone, and I know you can meet it. Walk me through how you built it, and let's set up a check so it doesn't happen again."

Why the strong version works: It's private (no peer audience), specific, uses wise feedback, treats them as a full team member, and focuses on a fix.

COMMON MISTAKES

- Mistaking casual style for lack of thought
- Over-explaining simple things
- Praising in a way that sounds like talking to a child
- Putting them on the spot in front of a group
- Lowering standards instead of supporting them to meet high ones

PRACTICE THIS WEEK

Ask a younger colleague, intern or student to teach you one thing they know well: a tool, an app or a trend. Listen without correcting.

SOURCES

- MIT News (2015) on Hartshorne & Germine, when cognitive skills peak
- Icenogle et al. (2019), Adolescents' cognitive capacity reaches adult levels prior to their psychosocial maturity
- Stanford SPARQ on Yeager et al. (2014), wise feedback
- ScienceDaily (2016) on Bryan et al., harnessing adolescent values
- UCLA Center for the Developing Adolescent on Yeager, Dahl & Dweck (2018), status and respect
- ScienceDaily (2009) on Buchanan & Hughes, expectations and teen behavior
- Live Science (2011) on Chein et al., peers and teen decision-making
- Educational Psychology Review (2025), meta-analysis of autonomy support and structure
- ScienceDaily (2015) on Gunraj et al., periods in text messages

More alike than different. Treat the person, not the category.

Pop culture says men and women speak different languages. Research says the differences are mostly small and depend heavily on the situation. The biggest communication problems at work come from stereotypes, uneven standards, and crossed boundaries. Here's what holds up, and the dos and don'ts for same-sex and opposite-sex colleagues.

MYTH

"Women talk far more than men."

When researchers recorded nearly 400 students' real conversations, women and men each spoke about 16,000 words a day. A broader review found men talk slightly more overall, but it depends on the setting: men talked more with spouses and strangers, women with their children and classmates.

MYTH

"Men and women are from different planets."

A review of dozens of meta-analyses found about 78% of measured psychological differences between men and women were small or close to zero. Communication style varies far more between individuals than between sexes.

Context

shapes speaking style
more than sex

META-ANALYSIS

Situations change how people talk

With strangers, women's speech leaned slightly toward building connection and men's toward influencing. With close friends and family, the differences mostly disappeared. Because the gaps appear and vanish by situation, researchers point to social habits more than biology.

Use it: Adapt to the individual and the setting. Someone quiet in a big meeting may be very direct one on one, regardless of gender.

Leaper & Ayres, *Personality and Social Psychology Review*, 2007

Double bind

competent but less liked

THREE EXPERIMENTS

The same behavior can be judged differently

Women who promoted their accomplishments were rated more competent, but less likable and less hireable. Men who downplayed themselves were seen as less competent. Each sex was penalized for stepping outside expectations.

Use it: When evaluating colleagues, ask: "Would I react the same way if a man or woman said this?" When promoting yourself, tie achievements to team results and data.

Rudman, *Journal of Personality and Social Psychology*, 1998

60%

of male managers uncomfortable mentoring or meeting alone with women

LARGE SURVEY

Avoiding the opposite sex backfires

A 2019 survey found 60% of male managers were uncomfortable mentoring, working alone with, or socializing with women. Senior men were 12 times more hesitant to have one-on-one meetings with junior women than with junior men. Avoidance cuts people off from the mentoring and visibility careers depend on.

Use it: The fix isn't avoidance. Apply the same professional standards to everyone: if you meet one on one with some colleagues, offer the same to all.

LeanIn.Org & SurveyMonkey, 2019

Same sex

harassment is still harassment

U.S. SUPREME COURT

Being the same sex isn't a free pass

In 1998, the Supreme Court ruled unanimously that a man harassed by male coworkers could bring a sex discrimination claim under federal law. Crude jokes, hazing or unwanted comments between people of the same sex can cross the line too.

Use it: Familiarity isn't permission. Keep the same professional boundaries with every colleague.

Oncale v. Sundowner Offshore Services, 1998

DOS AND DON'TS

Pick a situation

The core rule is the same everywhere: be professional, consistent, and respectful with everyone. These are the common pitfalls in each situation.

DO

- Keep the same professional boundaries you'd keep with anyone
- Invite others into casual conversations and outings, not just people like you
- Give direct, specific feedback, the same standard as for everyone
- Respect personal space and privacy

DON'T

- Locker-room or "just between us guys/girls" humor
- Assuming shared interests or opinions because you share a gender
- Teasing or hazing that wouldn't fly with others
- Building an inner circle that leaves others out of information or opportunities

PHRASES THAT WORK

"Want to grab lunch? Let's see if anyone else from the team wants to come."

"I'd rather keep it professional, but thanks."

"Let's bring Sam into this. He'll want to weigh in."

THE CONSISTENCY TEST

Before you say it, swap the person

1. **Would I say this to a colleague of the other sex?** If not, rethink it.
2. **Would I describe a man and a woman doing this the same way?** "Assertive" vs "aggressive," "confident" vs "arrogant."
3. **Am I giving everyone the same access?** Meetings, mentoring, stretch projects, after-work events.
4. **Is this about their work?** Comments on appearance, body or personal life rarely belong at work.
5. **Would I be comfortable if this were forwarded to HR?** A useful check for texts, jokes and messages.

IF SOMEONE CROSSES A LINE

Responding calmly and protecting yourself

For a minor slip, a short, direct reply is often enough: "Let's keep it to the work," or "I'd rather you didn't comment on my appearance." If behavior continues or is serious, write down what happened with dates and witnesses and take it to your manager or HR. This isn't legal advice; HR or an employment attorney can explain what applies to you.

INTERACTIVE TOOL

Feedback bias checker

Use this tool on the Clear at Work website.

DEEP DIVE

Going further: Gender

WHY IT WORKS

Most gender-related friction at work comes from inconsistency: different standards, different words or different access for the same behavior or role. The consistency test works because it turns a vague concern into a concrete check you can apply to any message or decision.

BUSINESS SCENARIO

Two team members, Maria and James, both push back hard on a proposal in a meeting.

WEAK APPROACH

Afterward, the manager tells Maria she came across as "aggressive" and tells James "great job challenging the plan."

STRONG APPROACH

The manager gives both the same feedback based on behavior: "Your pushback raised a real risk. Next time, try offering an alternative alongside the concern."

Why the strong version works: Feedback on the behavior, applied equally, is fair and actually helps both people improve.

COMMON MISTAKES

- Describing the same behavior with different words by gender
- Giving mentoring or travel opportunities to only one gender
- Assuming a colleague's interests or role based on gender
- Avoiding one-on-ones with the opposite sex instead of keeping them professional

PRACTICE THIS WEEK

Review the last performance feedback or recommendation you wrote. Swap the person's gender in your head and check whether you'd use the same words.

SOURCES

- Hyde (2005), The gender similarities hypothesis, *American Psychologist*
- UT Austin on Mehl et al. (2007), Are women really more talkative than men?
- ScienceDaily on Leaper & Ayres (2007)
- Rudman (1998), Self-promotion as a risk factor for women
- CNBC on the LeanIn.Org & SurveyMonkey survey (2019)
- Oncale v. Sundowner Offshore Services (1998), Cornell LII

Doing business across cultures

Global clients, international suppliers and diverse teams bring different expectations about directness, hierarchy and what "yes" means. A few habits prevent most misunderstandings.

LOW-CONTEXT COMMUNICATION

Say exactly what you mean

Common in the United States and Northern Europe. Meaning is in the words. Direct requests, explicit contracts, getting to the point quickly.

"We need the shipment by May 1, or we'll have to cancel the order."

HIGH-CONTEXT COMMUNICATION

Meaning lives in the relationship

Common in much of Asia, Latin America, Africa and the Middle East. Meaning comes from setting, relationship and what's left unsaid. Building trust often comes before business.

"May could be difficult" may mean "No, it won't happen."

This framework comes from anthropologist Edward T. Hall. It describes broad tendencies, not rules about individuals. Treat every person as an individual.

CROSS-CULTURAL HABITS

Practical rules for international business

1. **Confirm in writing.** In some cultures "yes" can mean "I hear you," not "I agree." Follow calls with a written recap.
2. **Drop idioms and sports metaphors.** "Let's touch base and hit it out of the park" confuses non-native speakers.
3. **Learn names properly.** In many East Asian countries and Hungary, the family name comes first. Ask how to pronounce names.
4. **Respect hierarchy where it matters.** In some cultures, addressing the most senior person first is expected.
5. **Mind time and holidays.** Check local holidays before setting deadlines and list meeting times in both zones.
6. **Go easy on humor.** Sarcasm and jokes rarely translate well, especially in writing.

INTERACTIVE TOOL

Cross-cultural scenarios

Use this tool on the Clear at Work website.

8 scales

describe how business
cultures differ

PRACTITIONER FRAMEWORK

Culture is relative: it depends on who you're working with

INSEAD professor Erin Meyer maps cultures on eight scales: communicating (explicit vs. implicit), evaluating (direct vs. indirect criticism), persuading (principles-first vs. applications-first), leading (egalitarian vs. hierarchical), deciding (consensus vs. top-down), trusting (task-based vs. relationship-based), disagreeing (open debate vs. avoiding confrontation) and scheduling (fixed time vs. flexible time). Her key point: what matters is the gap between two cultures, not where either one sits on its own. To a German colleague, an American may seem indirect; to a Japanese colleague, the same American may seem very direct.

Use it: Before working with a new international partner, think about where your culture and theirs sit on each scale. Plan for the biggest gaps.

Meyer, *The Culture Map*, 2014

Slow down

is the most useful
advice for native
English speakers in
global teams

FIELD RESEARCH

Native speakers carry the burden of being understood

Harvard Business School professor Tsedal Neeley studied companies that adopted English as their shared business language. She found that non-native speakers often felt anxious and withdrew from discussions, while native speakers rarely noticed. Teams worked better when native speakers slowed down, avoided idioms and checked for understanding, and when leaders actively drew out non-native speakers.

Use it: With international colleagues, drop idioms ("touch base," "ballpark," "hit it out of the park"), speak a little slower, and follow important calls with a written summary.

Neeley, *Harvard Business Review*, 2012

SCALE	ONE END	OTHER END
Communicating	Low-context: say exactly what you mean (U.S., Netherlands, Australia)	High-context: meaning is implied (Japan, Korea, Indonesia)
Evaluating	Direct negative feedback (Netherlands, Russia, Israel)	Indirect negative feedback (Japan, Thailand, Saudi Arabia)
Leading	Egalitarian (Denmark, Sweden, Australia)	Hierarchical (Japan, Korea, Nigeria)
Trusting	Task-based: trust comes from good work (U.S., Germany)	Relationship-based: trust comes from personal bonds (China, Brazil, India)
Scheduling	Linear time: deadlines are fixed (Germany, Switzerland)	Flexible time: plans adapt (India, Nigeria, Saudi Arabia)

Country examples follow Meyer's published placements and describe broad tendencies. Individuals vary widely, and many professionals adapt to international norms.

DEEP DIVE

Going further: Cross-cultural business

WHY IT WORKS

Cultures differ in how much meaning is carried by words versus context, relationship and setting. In low-context communication, the words are the message. In high-context communication, what's unsaid can matter more. When the two meet, low-context communicators can seem blunt, and high-context communicators can seem vague. Making expectations explicit in writing bridges both.

BUSINESS SCENARIO

A U.S. company asks a supplier in another country if a shipment can arrive by May 1. The supplier replies, "We will try our best."

WEAK APPROACH

Treating that as a yes and promising the date to your own client.

STRONG APPROACH

Asking specifically: "What would help make May 1 possible? If it's not realistic, what date can you confirm?" Then confirming the agreed date in writing.

Why the strong version works: "We will try our best" can be a polite way to signal difficulty. Open questions and a written confirmation prevent a costly surprise.

COMMON MISTAKES

- Assuming silence or "yes" means agreement
- Using idioms, slang or sports metaphors
- Getting straight to business where relationship-building is expected
- Stereotyping an individual based on their country

PRACTICE THIS WEEK

Review your last email to an international contact. Remove idioms, spell out acronyms, and add a one-line written confirmation of any agreement.

SOURCES

- Cultural dimensions: Hall, verbal and nonverbal (Kirkwood)
- Business Insider on Erin Meyer's eight culture scales
- HBS Working Knowledge on Neeley's research into English as a global business language

How to apologize at work, and mean it

Everyone makes mistakes at work: a missed deadline, an error in a client report, a comment that landed badly. A good apology can repair the relationship and even strengthen trust. A bad one makes things worse.

6

elements of an effective apology

TWO STUDIES, 755 PEOPLE

Owning the mistake matters most

Researchers tested six apology elements: expressing regret, explaining what went wrong, acknowledging responsibility, declaring repentance, offering repair and asking for forgiveness. Acknowledging responsibility was the most important, followed by offering to repair the damage. Asking for forgiveness mattered least. More elements generally made apologies more effective.

Use it: Say clearly, "That was my mistake," then say what you'll do to fix it. Skip "if you were offended."

Lewicki, Polin & Lount, *Negotiation and Conflict Management Research*, 2016

1 Own it

"I made a mistake in the figures I sent you."

3 Explain briefly, without excuses

"I pulled last quarter's tab by mistake."

5 Commit to change

"It won't happen again; I'll double-check every report before it goes out."

2 Show you understand the impact

"I know that put you in a tough spot with your board."

4 Offer repair

"Here's the corrected report, and I've added a second review step."

6 Follow through

Trust is rebuilt by what you do next, not by the apology itself.

NON-APOLOGY

~~I'm sorry if anyone was confused by the email.~~

REAL APOLOGY

I'm sorry. My email had the wrong deadline, and that's on me. The correct date is March 12.

"If anyone was confused" shifts blame to the reader. Name what you did.

APOLOGY WITH AN EXCUSE

~~Sorry the report was late, but I've been swamped with three other projects.~~

APOLOGY WITH OWNERSHIP

I'm sorry the report was late. I should have flagged the conflict earlier. It's attached now, and I'll give you a heads-up next time I see a timing risk.

"But" erases the apology. Explanations are fine; excuses aren't.

For client incidents involving money, contracts or safety, check your company's policy before apologizing in writing, since some organizations require legal or management review.

47% vs 9%

of strangers lent a phone after an apology for the rain versus none

SMALL FIELD STUDY

Even an apology for something you didn't cause can build trust

In a study by Alison Wood Brooks, Hengchen Dai and Maurice Schweitzer, an actor asked strangers at a train station on a rainy day to borrow their phone. When he first said "I'm so sorry about the rain!", 47% agreed, compared with 9% when he just asked. The researchers concluded that "superfluous apologies" show empathy and increase trust. The field study had no neutral comparison, such as a friendly remark about the weather, so part of the effect may come from any warm opener.

Use it: Expressions of regret for things outside your control ("I'm sorry you had to wait so long for this") can show care. Don't use them to dodge responsibility for things you did cause.

Brooks, Dai & Schweitzer, *Social Psychological and Personality Science*, 2014

Later

apologies worked better when the other person felt heard first

TWO EXPERIMENTS

Timing matters: let them speak before you apologize

Cynthia Frantz and Courtney Bennisson found that apologies were more effective when they came later in a conversation, after the hurt person had a chance to explain how they felt, rather than right away. An instant apology can feel like a way to close the subject before the other person has been heard.

Use it: When someone raises a problem, listen first: "Tell me what happened from your side." Then apologize, specifically, for what you heard.

Frantz & Bennisson, *Journal of Experimental Social Psychology*, 2005

NON-APOLOGY	WHY IT FAILS	REAL APOLOGY
"I'm sorry if you were offended."	Puts the problem on their reaction	"I'm sorry I made that comment in front of the client."
"Mistakes were made."	No one owns it	"I made a mistake in the forecast."
"I'm sorry, but I was swamped."	"But" cancels the apology	"I'm sorry I missed the deadline. Here's how I'll prevent it."
"Sorry, sorry, sorry!"	Over-apologizing about small things reads as nervous	"Thanks for your patience." (for small delays)

DEEP DIVE

Going further: Apologizing & rebuilding trust

WHY IT WORKS

A mistake raises a question for the other person: will this happen again? Taking responsibility shows you understand what went wrong, and offering repair shows you'll make it right. Together they answer that question. Excuses and conditional apologies do the opposite, signaling that you don't see the problem.

BUSINESS SCENARIO

You sent a client an invoice with the wrong amount, and they noticed before paying.

WEAK APPROACH

"Sorry about that, the system must have glitched. Here's the new one."

STRONG APPROACH

"Thank you for catching that, and I'm sorry. I entered the hours from the wrong project. The corrected invoice is attached, and I've added a review step before invoices go out."

Why the strong version works: It thanks the client, owns the error, explains it in one line, fixes it and shows a process change.

COMMON MISTAKES

- "I'm sorry if you were offended"
- Blaming tools, timing or other people
- Over-apologizing until it becomes about your feelings
- Apologizing without changing anything

PRACTICE THIS WEEK

Think of a recent mistake, however small. Write the apology using the six steps, even if you don't send it, and notice which step was hardest.

SOURCES

- Ohio State News (2016), The 6 elements of an effective apology
- BPS Research Digest (2014) on Brooks et al., apologizing for the rain
- Florida Tech Psychology Science Minute on Frantz & Bennis (2005), timing of apologies

Your first team: leading through communication

Moving into management changes your job from doing the work to helping others do it. Most of that happens through communication: setting expectations, delegating, giving feedback and listening.

10

behaviors of Google's
best managers

COMPANY RESEARCH

What great managers actually do

Google's Project Oxygen studied what separates its best managers. The updated list of ten behaviors includes coaching well, empowering the team without micromanaging, building an inclusive team, being results-focused, communicating well (both listening and sharing information), supporting career development, having a clear vision, technical skill, collaborating across the company and making strong decisions. Google reported the list predicted team turnover, satisfaction and performance.

Use it: Communication runs through almost every behavior on the list. Listening and sharing information are named directly.

Google Project Oxygen, reported by Quartz, 2018

First 30 days: listen

Meet each person one on one. Ask: "What's working? What's frustrating? What do you need from me? How do you like to receive feedback?"

Days 30–60: set expectations

Share how you'll work: meeting rhythm, how to reach you, what decisions you want to be involved in, and what "great work" looks like.

Days 60–90: build habits

Regular one-on-ones, clear goals for each person, and a simple way to share team updates.

DELEGATING CLEARLY

- **Outcome:** what done looks like
- **Deadline:** when, and why
- **Authority:** can they decide, or should they check with you first?
- **Check-ins:** when you'll touch base

PHRASES THAT BUILD TRUST

"What do you think we should do?"

"I made the wrong call on that. Here's what I'm changing."

"Thanks for raising that. I'd rather hear bad news early."

"Here's the context behind this decision."

MANAGING FORMER PEERS

- Acknowledge the change directly in a one-on-one
- Keep friendly relationships, but avoid favoritism and venting about the team
- Be consistent: same standards and access for everyone

70%

of the variance in team engagement is attributed to the manager

LARGE WORKPLACE STUDY

Your manager shapes your experience more than anything else

Gallup's research across millions of employees found that managers account for at least 70% of the variance in employee engagement between teams. Teams with the same pay, policies and company culture can feel completely different depending on who leads them. Gallup's data points to frequent, meaningful conversations, such as weekly check-ins about goals and progress, as one of the strongest habits of engaging managers.

Use it: Hold a short, regular one-on-one with each person. Don't cancel it when things get busy; that's when it matters most.

Gallup, *State of the American Manager*, 2015

Psychological safety

was the top factor in Google's study of effective teams

MULTI-YEAR STUDY

Teams perform better when it's safe to speak up

Harvard professor Amy Edmondson defined psychological safety as a shared belief that a team is safe for taking interpersonal risks: asking questions, admitting mistakes, disagreeing. In her studies, teams with more psychological safety reported more errors, because they were willing to talk about them, and learned faster. Google's Project Aristotle later studied about 180 of its own teams and found psychological safety mattered more than any other factor in what made a team effective.

Use it: Respond to bad news with curiosity, not blame: "Thanks for flagging it early. What do we need to fix it?" How you react the first time sets the rules.

Edmondson, *Administrative Science Quarterly*, 1999; Google re:Work

1 in 3

feedback efforts actually made performance worse

META-ANALYSIS, 607 EFFECTS

Feedback can backfire when it targets the person

Avraham Kluger and Angelo DeNisi reviewed decades of research on feedback. On average feedback improved performance, but in about a third of cases it made performance worse. Feedback that drew attention to the person ("you're careless") rather than the task ("the totals on page 3 don't match") was most likely to backfire.

Use it: Keep feedback about the work, specific and forward-looking: "Next time, double-check totals against the source file before sending."

Kluger & DeNisi, *Psychological Bulletin*, 1996

ONE-ON-ONE AGENDA

A 30-minute one-on-one that people look forward to

1. **Their topics first (10 min):** "What's on your mind this week?"
2. **Progress and blockers (10 min):** "What's slowing you down that I can help with?"
3. **Growth (5 min):** "What would you like to get better at this quarter?"
4. **Feedback both ways (5 min):** "What's one thing I could do differently to help you?"
5. **Write down** any commitments you make, and follow through before the next one.

DEEP DIVE

Going further: Communicating as a new manager

WHY IT WORKS

New managers often over-talk and under-listen, trying to prove they deserve the role. But teams perform best when people understand the goals, feel heard and know what's expected. Early listening builds trust and surfaces problems; clear expectations prevent the guesswork that causes frustration on both sides.

BUSINESS SCENARIO

You've been promoted to lead the team you used to be part of.

WEAK APPROACH

Announcing several process changes in your first team meeting to show you're in charge.

STRONG APPROACH

"I know this is a change for all of us. Over the next few weeks I'll meet with each of you to hear what's working and what isn't before I change anything. My door is open in the meantime."

Why the strong version works: It acknowledges the awkwardness, shows respect for the team's experience and earns input before decisions.

COMMON MISTAKES

- Changing things before understanding them
- Doing the work yourself instead of delegating
- Delegating without saying how much authority someone has
- Canceling one-on-ones when things get busy

PRACTICE THIS WEEK

Delegate one task using outcome, deadline, authority and check-in. Afterward, ask the person whether anything was unclear.

SOURCES

- Quartz (2018), [Google expands its list of what it takes to be a great manager](#)
- Becker's (2015) on Gallup: [managers account for 70% of variance in engagement](#)
- Edmondson (1999), [Psychological safety and learning behavior in work teams](#)
- World Economic Forum on [Google's Project Aristotle](#)
- Kluger & DeNisi (1996), [The effects of feedback interventions on performance, abstract](#)

PART 6

Sales communication

How salespeople earn trust instead of dread: listening first, recommending honestly, handling "no" gracefully and following up like a good neighbor, not a pushy pitch.

1. Your sales path through this guide
2. Why people dread salespeople
3. From salesperson to trusted neighbor
4. Discovery: asking and listening
5. Recommending without pressure
6. Hesitation, objections and "no"
7. Follow-up that feels like friendship

Selling is communication. This whole guide is your sales training.

Every skill on this site shows up in a sales conversation: first impressions, listening, clear writing, persuasion, negotiation, emotion and follow-up. This topic shows salespeople what to study, in what order, and how to practice it on real calls so it becomes natural instead of scripted.

61%

of B2B buyers said they'd prefer a buying experience with no sales rep at all

SURVEY OF 632 BUYERS

Many buyers would rather skip the salesperson

A 2024 Gartner survey of 632 business buyers found that 61% preferred an overall "rep-free" buying experience. Gartner's advice to sales leaders wasn't to sell harder. It was to offer something buyers can't get from a website: a sounding board who helps them think through their decision and gives guidance specific to their situation.

Use it: Ask yourself before every call: "What will this person understand or decide better because they talked to me?" If the answer is "nothing they couldn't read online," rethink the call.

Gartner press release, June 2025

SALES MOMENT	STUDY THIS TOPIC	WHAT IT DOES FOR YOU
Before the first call	Your communication style	Know your defaults, and recognize the buyer's style so you can adjust
The first 60 seconds	Listening & first impressions	Lead with warmth, then show competence
Cold outreach and voicemail	Phone & voicemail, Email that gets answered	Short, clear messages that earn a reply
Discovery	Discovery: asking and listening	Find the real need before you pitch
Presenting a solution	Building a presentation, Making it stick	A clear recommendation people remember
Word choice	Word choice, Words that engage	Specific, honest language instead of hype
Asking for the decision	Getting to yes, Recommending without pressure	Ethical persuasion that respects their choice
Price and terms	Negotiation	Trade instead of discounting; protect the relationship
Pushback and complaints	Hesitation, objections and "no", Emotion at work	Stay calm, curious and respectful
Mistakes and missed promises	Apologizing & rebuilding trust	Keep the customer after something goes wrong
Different customers	Age gaps, Gender, Cross-cultural business	Respect without stereotypes
After the sale	Follow-up that feels like friendship, Networking	Referrals, repeat business and a reputation

AN ORGANIZED PATH

The 6-week sales track

About 20 minutes a day of study, plus one real conversation a week where you practice on purpose. Use the study plan builder to schedule your reviews.

WEEK 1 **The sales mindset**

This section: why people dread salespeople, and how trusted advisors behave

WEEK 2 **Listening and first impressions**

Listening, body language and voice, phone, plus sales discovery

WEEK 3 **Writing that gets replies**

Email, tone, better wording, words that engage

WEEK 4 **Honest persuasion**

Getting to yes,
recommending without
pressure, frameworks

WEEK 5 **Objections and deals**

Objections, negotiation,
emotion, difficult
conversations

WEEK 6 **Long-term relationships**

Follow-up, networking,
apologies, culture and age

PRACTICE THAT STICKS

Turn every real call into practice

1. **Pick one skill per week.** "This week I'll ask two follow-up questions before I mention our product." One focus beats ten tips.
2. **Prepare in two minutes.** Use the discovery call planner to write your opening, three questions and the next step you'll suggest.
3. **Review right after.** Before the next call, write three lines: what they needed, what I said that helped, what I'd change.
4. **Listen to yourself.** If your company records calls (with everyone's consent), replay five minutes a week. Notice how often you interrupt or talk past the customer's point.
5. **Check your messages.** Paste follow-up emails into the pressure check before sending.
6. **Ask a customer.** Once a month, ask a friendly client: "What's one thing I could do to make working with me easier?"

DEEP DIVE

Going further: Your sales path

WHY IT WORKS

Sales training often teaches scripts and closing techniques. Scripts feel forced because they're built around what the seller wants to say next, not what the buyer just said. The communication skills in this guide work differently: they make you better at understanding people, explaining clearly and respecting choices. Once those skills are habits, the conversation flows naturally because you're responding to a real person, not following a page.

BUSINESS SCENARIO

A new sales rep at an office-equipment company has memorized a five-step pitch and wonders why prospects go cold.

WEAK APPROACH

Delivering the same pitch faster and with more enthusiasm, and adding another "limited-time offer" to create urgency.

STRONG APPROACH

Spending a week on listening and discovery. On each call, asking three questions about how the office runs today before mentioning a product, and writing down the customer's exact words for their biggest frustration.

Why the strong version works: Prospects go cold when they feel processed. When the rep's recommendation uses their own words ("You said the copier jams every Monday"), it feels like advice, not a pitch.

COMMON MISTAKES

- Treating communication as "soft" and product knowledge as the real job
- Memorizing scripts instead of learning to listen
- Trying to fix everything at once
- Never reviewing your own calls

PRACTICE THIS WEEK

Pick one row from the table above that matches your weakest moment in a sale. Study that topic this week and use it on three real conversations.

SOURCES

- Gartner (2025), Sales survey finds 61% of B2B buyers prefer a rep-free buying experience

The dread is learned, so it can be unlearned, one conversation at a time

Most people have had a salesperson ignore what they said, push too hard, or make a promise that didn't hold up. They walk into your conversation expecting the same. Knowing why people feel that way is the first step to being the salesperson they're glad they talked to.

9%

of Americans rated car salespeople's honesty and ethics as high or very high

NATIONAL POLL

Sales has a trust problem to overcome

Every year Gallup asks Americans to rate the honesty and ethics of different professions. In its 2019 poll, only 9% rated car salespeople high or very high, and 13% said the same of insurance salespeople. Nurses topped the list at 85%. Sales roles have ranked near the bottom for decades.

Use it: Don't take initial guardedness personally; it's not about you. Expect to earn trust with your first few minutes of behavior, not your title or your company's reputation.

Gallup Honesty and Ethics poll, 2019

Radar

people learn to recognize and resist persuasion tactics

CLASSIC THEORY, WIDELY TESTED

Customers can spot a tactic, and it changes how they hear you

Marketing researchers Marian Friestad and Peter Wright described the "persuasion knowledge model": over a lifetime of ads and sales pitches, people build up knowledge about persuasion tactics. When they notice one (a fake deadline, flattery, an "only two left" message), they stop focusing on the product and start focusing on the tactic, often becoming more skeptical of the seller. Later research has supported this pattern in many settings.

Use it: Drop anything that feels like a technique. Give real reasons, real deadlines and real numbers. Honesty is the one approach a skeptical buyer has no defense against.

Friestad & Wright, *Journal of Consumer Research*, 1994

Reactance

pressure makes people
push back to protect
their freedom

DECADES OF RESEARCH

Pressure triggers the urge to say no

Psychologist Jack Brehm's theory of psychological reactance holds that when people feel their freedom to choose is threatened, they become motivated to restore it, often by doing the opposite of what they're being pushed toward. Demands like "you need to decide today" can make a reasonable offer feel like a trap.

Use it: Make their freedom obvious: "Take the time you need," or "If it's not the right fit, I'd rather you tell me." People relax when they don't have to defend themselves.

Brehm, A Theory of Psychological Reactance, 1966

WHAT CREATES DREAD	WHAT THE CUSTOMER THINKS	WHAT A TRUSTED NEIGHBOR DOES INSTEAD
Talking before listening	"They don't care what I need."	Asks about their situation first, and remembers the answers
Fake urgency ("today only")	"They're trying to rush me."	Gives real deadlines with reasons, or none at all
Dodging the price question	"Something's hidden."	States the price plainly, with what's included
Overpromising	"It's too good to be true."	Names the limits: "Here's what it won't do"
Ignoring a "no"	"I'll never answer their call again."	Accepts it warmly and leaves the door open
Fake friendliness	"This is an act."	Is genuinely curious; doesn't fake a bond that isn't there yet
Disappearing after the sale	"I was just a number."	Checks in to make sure it's working
Badmouthing competitors	"What do they say about me?"	Compares fairly, and sometimes recommends someone else

DEEP DIVE

Going further: Why people dread salespeople

WHY IT WORKS

Dread comes from a mismatch of goals: the customer thinks you want the sale more than you want them to be well served. Everything that signals "my goal comes first" (rushing, talking over them, hiding the price) confirms the fear. Everything that signals "your situation comes first" (questions, honesty about limits, letting them decide) disproves it. You can't argue someone out of dread, but you can behave them out of it.

BUSINESS SCENARIO

A homeowner opens the door to a solar-panel sales rep and immediately crosses their arms.

WEAK APPROACH

"Hi! Great news, your home qualifies for our special program, but it ends this week. Do you have ten minutes for me to show you how much you'll save?"

STRONG APPROACH

"Hi, I'm Jordan with Brightline Solar. I know nobody loves a knock at the door, so I'll be quick. We're installing on Maple Street this month. If solar's ever crossed your mind, I can leave a one-page estimate for your roof. No pressure either way."

Why the strong version works: It names the awkwardness, uses a real reason for being there, keeps it short and gives them an easy, respected way out. That's what lowers the guard.

COMMON MISTAKES

- Mistaking guardedness for rudeness
- Using scarcity or urgency that isn't real
- Filling every silence with more pitch
- Pretending to be a friend before earning it

PRACTICE THIS WEEK

Write down three moments when you were dreading a salesperson. For each, write what they did that caused it. Check whether you do any of those things.

SOURCES

- Gallup (2019), Nurses continue to rate highest in honesty, ethics
- Friestad & Wright (1994), The persuasion knowledge model, *Journal of Consumer Research*
- Simply Psychology, psychological reactance and why pressure backfires

Be the neighbor people ask for advice, not the one they hide from

Think of the neighbor everyone trusts: they know their stuff, they tell you the truth even when it's not what you want to hear, they remember what you told them last time, and they'd tell you if you didn't need something. That's the model for a salesperson people look forward to talking to. It isn't a personality type; it's a set of habits anyone can build.

\$155/hr

for ambiverts vs. about
\$125 for extraverts and
\$120 for introverts

FIELD STUDY, 340 SALESPEOPLE

The best sellers aren't the loudest

Wharton professor Adam Grant studied 340 call-center sales representatives and tracked their revenue for three months. Reps in the middle of the extraversion scale, called "ambiverts," earned about \$155 per hour, compared with about \$125 for strong extraverts and \$120 for introverts. Grant's explanation: very outgoing reps can talk too much and come across as overconfident, while ambiverts naturally balance speaking up with listening.

Use it: If you're outgoing, practice pausing and asking one more question. If you're quiet, practice stating your recommendation clearly. Both are moving toward the same balanced middle.

Grant, *Psychological Science*, 2013

C + R + I

divided by self-
orientation: a model of
how trust is built

PRACTITIONER MODEL

The trust equation

In *The Trusted Advisor*, consultants David Maister, Charles Green and Robert Galford describe trust as four parts. **Credibility:** do you know what you're talking about? **Reliability:** do you do what you say? **Intimacy:** is it safe to tell you the real problem? Those three are divided by **self-orientation:** how much you seem focused on yourself (your quota, your pitch, looking smart). It's a practical framework from experience, not a lab finding, but it's widely used because it's easy to act on.

Use it: The fastest way to raise trust is often to lower self-orientation: talk less about your product and quota, and more about their situation.

Maister, Green & Galford, *The Trusted Advisor*, 2000

LEVEL 1

The pusher

Talks most of the time, pushes the product of the month, creates pressure. Customers avoid them.

LEVEL 2

The order-taker

Polite and helpful, but only answers what's asked. Customers use them, then shop elsewhere for advice.

LEVEL 3

The trusted neighbor

Understands the customer's situation, gives honest advice, sometimes says "you don't need this." Customers call them first.

REMEMBER DETAILS

Their kid's name, the project they mentioned, the problem from last time. Write it in your notes right after the call and mention it next time.

TELL THE TRUTH ABOUT LIMITS

"Honestly, the basic plan is enough for a team your size." Saying what not to buy makes everything else you say believable.

BE USEFUL WITHOUT A SALE

Share an article, an introduction or a tip that helps them, even if it doesn't lead to an order this month.

KEEP SMALL PROMISES

"I'll send that by 3" and then sending it by 3. Reliability is built in small, visible moments.

BE THE SAME PERSON EVERY TIME

Same tone whether they're buying or not. People notice when warmth disappears after the contract is signed.

LET THEM SEE YOUR REASONING

"I'd suggest option B because you said budget matters more than speed." Showing why turns a pitch into advice.

DEEP DIVE

Going further: From salesperson to trusted neighbor

WHY IT WORKS

Natural, unforced conversation comes from genuine interest, not technique. When you actually want to understand someone's situation, your questions, tone and body language line up on their own, and the customer feels it. Forced conversation comes from running a script while your mind is on the close. The habits on this page shift your attention from "How do I get the sale?" to "What does this person need?", and the natural tone follows from there.

BUSINESS SCENARIO

A small-business owner asks an insurance agent about adding a policy their friend recommended.

WEAK APPROACH

"Great idea! That's one of our most popular policies. I can get you set up today."

STRONG APPROACH

"Happy to look at it. Can I ask what your friend's business does? That policy makes sense for businesses with delivery vehicles. Since you don't have any, you'd be paying for coverage you can't use. What I'd look at for you instead is..."

Why the strong version works: The agent gives up a sale today and earns a client who will trust every recommendation after it, and who will tell friends about the agent who saved them money.

COMMON MISTAKES

- Forcing personal chat before the customer is ready
- Faking interest in topics you don't care about
- Hiding downsides to protect the sale
- Being warm before the contract and hard to reach after

PRACTICE THIS WEEK

On at least one call, recommend something smaller or cheaper than the customer expected, and explain why. Notice how they respond to the rest of your advice.

SOURCES

- Grant (2013), Rethinking the extraverted sales ideal: the ambivert advantage, *Psychological Science*
- Summary of *The Trusted Advisor* (Maister, Green & Galford), including the trust equation

Understand the problem before you offer a solution

"Discovery" is the part of a sales conversation where you learn the customer's situation, what's not working and why it matters. Done well, it feels like talking with someone who genuinely gets it. It's also where most of the trust in a sale is built.

35,000

sales calls studied to find what successful sellers do differently

LARGE OBSERVATIONAL RESEARCH

Successful sellers ask about problems and consequences

Neil Rackham's research team at Huthwaite observed about 35,000 sales calls over 12 years. In larger, more complex sales, successful sellers asked more questions, and especially more questions about the customer's problems and the consequences of those problems, before describing their product. Rackham organized the pattern as SPIN: **Situation, Problem, Implication** and **Need-payoff** questions. Less successful sellers jumped to features early.

Use it: Don't stop at "What's the problem?" Ask "What happens when that goes wrong?" and "What would fixing it mean for you?" The customer sells themselves on the value.

Rackham, *SPIN Selling*, 1988

57% vs 62%

seller talk time on won vs. lost deals, in one company's call data

COMPANY DATA, NOT PEER-REVIEWED

Winning calls had a bit less seller talking

The sales software company Gong analyzed about 326,000 recorded sales calls on its platform. On average, sellers talked about 60% of the time. In deals that were won, seller talk time averaged 57%; in deals that were lost, 62%. The difference was largest for lower-performing sellers. This is correlation from one company's customers, not an experiment, but it fits the broader research on listening and question-asking.

Use it: Aim for the customer to talk at least as much as you do in early calls. If you notice you've been talking for more than a minute straight, finish with a question.

Gong call analysis, 2025

QUESTION BANK

Discovery questions, from easy to deep

Situation: "Walk me through how you handle this today."

Situation: "Who else is involved when you make a decision like this?"

Problem: "What's the most frustrating part of the current setup?"

Problem: "What made you start looking now?"

Implication: "When that happens, what does it cost you in time or money?"

Implication: "How does that affect your team or your customers?"

Need-payoff: "If that were fixed, what would be different for you?"

Need-payoff: "What would make this worth the investment?"

INTERACTIVE TOOL

Discovery call planner

Use this tool on the Clear at Work website.

DEEP DIVE

Going further: Discovery

WHY IT WORKS

People trust advice more when it's clearly built on their own situation. Good discovery questions do three things at once: they give you the information to make a real recommendation, they show the customer you care about their problem, and they help the customer think through the cost of doing nothing. A recommendation that follows good discovery sounds like a summary of what the customer already told you, which is why it doesn't feel like a pitch.

BUSINESS SCENARIO

A prospect says, "We're just looking at options right now."

WEAK APPROACH

"Great! Let me tell you why we're the best option. We have the most features in the market, 24/7 support, and..."

STRONG APPROACH

"Makes sense. What got you started looking? Was there a moment when the current setup really didn't work?" (Prospect describes double-booked clients during tax season.)
"How often did that happen? What did it cost you?"

Why the strong version works: "Just looking" usually hides a real trigger. A curious question uncovers it, and the rest of the conversation is about their problem, not your feature list.

COMMON MISTAKES

- Asking questions you could have answered with five minutes of research
- Interrogating: firing questions without reacting to the answers
- Leading questions that push toward your product
- Pitching the moment you hear a problem

PRACTICE THIS WEEK

On your next three calls, ask at least one implication question ("What does that cost you?") before you mention any product. Write down the answer in the customer's own words.

SOURCES

- Neil Rackham, Huthwaite research and *SPIN Selling* (overview)
- Gong, Mastering the talk-to-listen ratio in sales calls

Give advice the way a knowledgeable friend would

A friend who knows cars doesn't hand you a brochure and a deadline. They say: "Based on what you told me, I'd get this one, and here's why. But it's your call." That's a recommendation. Everything else is pressure.

"But you are free"

reminding people they can say no tends to raise agreement

MIXED EVIDENCE

Saying "it's your choice" can make a yes more likely

In many studies, adding a simple reminder like "but you are free to say no" to a request increased how often people agreed. A 2013 meta-analysis by Christopher Carpenter reported that it roughly doubled compliance across 42 studies. A larger 2024 re-examination found a smaller but still meaningful effect overall, strongest in face-to-face requests, while noting that the best-controlled studies showed little effect. The safest takeaway: respecting choice doesn't hurt, and it often helps.

Use it: End recommendations with genuine freedom, not a closing trick: "That's what I'd do in your position. Totally your decision, and I'm happy to answer anything else."

Carpenter, *Communication Studies*, 2013; Meta-analysis in *Meta-Psychology*, 2024

Two-sided

messages that address the downsides tend to persuade better

META-ANALYSIS

Mentioning the downside, and answering it, builds credibility

Communication researcher Daniel O'Keefe combined dozens of studies comparing one-sided messages (only the benefits) with two-sided messages (benefits plus drawbacks). Two-sided messages that acknowledged a downside and then answered it were more persuasive than one-sided ones. Simply listing downsides without addressing them was less persuasive outside of advertising, so the answer matters.

Use it: Name the honest trade-off and explain why it still makes sense: "It costs more upfront than the other option. Over three years, though, you'd spend less because maintenance is included."

O'Keefe, *Communication Yearbook*, 1999

Not always

more choices don't reliably overwhelm people, but they can

MIXED EVIDENCE

The "too many choices" effect is real only sometimes

A famous 2000 study found shoppers were more likely to buy jam from a display of 6 flavors than 24. But a 2010 meta-analysis of 50 experiments by Benjamin Scheibehenne and colleagues found the average effect of having more options was close to zero. Overload seems to happen under specific conditions, like when options are hard to compare or the person has no clear preference.

Use it: Don't hide options, but do the comparing for them: "There are five plans. For your situation, it comes down to these two. Here's the difference."

Scheibehenne, Greifeneder & Todd, *Journal of Consumer Research*, 2010

PRESSURE PHRASE	WHY IT BACKFIRES	NATURAL ALTERNATIVE
"This deal ends today."	Feels like a trap, especially if it isn't true	"This pricing holds through the 30th, because our rates go up in the new year."
"You need this."	Tells them what they think	"Based on what you said about the Monday backlog, this would help most."
"What would it take to get you to sign today?"	Makes it about your close	"What else would you want to know before deciding?"
"Trust me."	Makes people trust you less	"Here's a customer you can call," or "Here's the data."
"Everyone's buying this."	Feels like herding	"Most firms your size pick the standard plan. Here's why it fits them."
"It's a no-brainer."	Dismisses their real concerns	"I think it makes sense for you, and here's my reasoning."
"Are you ready to move forward?"	Yes-or-no pressure at the end	"Would it help if I sent a summary you can share with your partner?"

INTERACTIVE TOOL

Pressure check

Use this tool on the Clear at Work website.

HONEST SELLING CHECKLIST

Before you ask for a decision

1. **Real reasons:** every claim you made is true and you can back it up.
2. **Real price:** the total cost, including fees and renewals, has been said plainly.
3. **Real limits:** you've named what it won't do and who it isn't for.
4. **Real deadline (or none):** any time limit exists for a reason you can explain.
5. **Real choice:** they know they can say no, wait, or compare, and you'll still be helpful.
6. **Know the rules:** some sales come with legal cancellation rights. In the U.S., the FTC's Cooling-Off Rule gives buyers three business days to cancel many door-to-door and off-site sales; check what applies in your industry and location.

DEEP DIVE

Going further: Recommending without pressure

WHY IT WORKS

A recommendation works because it lowers the customer's effort: you've done the thinking and you're showing your reasoning. Pressure works against you because it raises the customer's guard: now they have to decide whether you're trustworthy, not just whether the product is right. When you make your reasoning visible and the choice clearly theirs, you remove the second question entirely.

BUSINESS SCENARIO

A customer at a furniture store is choosing between two sofas and says, "I'm not sure."

WEAK APPROACH

"This one's flying off the floor; we only have two left. If you want it before the holidays, you need to order today."

STRONG APPROACH

"You mentioned you have a dog and young kids. I'd go with the performance fabric; the other one stains easily. It's about \$200 more. Take a photo of both and the tags, sleep on it, and if you come back I'll make sure you get the same price."

Why the strong version works: The recommendation is tied to their life, the trade-off is honest and the decision is theirs. Many people come back, and they tell friends where they got good advice.

COMMON MISTAKES

- Recommending the highest-commission option by default
- Listing every option without a recommendation
- Hiding the downsides until after the sale
- Using fake scarcity or fake deadlines

PRACTICE THIS WEEK

Run your three most-used sales emails or scripts through the pressure check. Rewrite every flagged phrase, and add one honest trade-off to each.

SOURCES

- PsyBlog on Carpenter (2013), the "but you are free" technique across 42 studies
- The effectiveness of the "But-you-are-free" technique: meta-analysis and re-examination, *Meta-Psychology*
- O'Keefe (1999), How to handle opposing arguments in persuasive messages: a meta-analytic review
- Scheibehenne, Greifeneder & Todd (2010), Can there ever be too many options? A meta-analytic review
- Federal Trade Commission, Cooling-Off Rule for sales made at home or other locations

An objection is a question, not an attack

"It's too expensive." "We're happy with what we have." "Let me think about it." Pushy salespeople treat these as obstacles to knock down. Trusted ones treat them as useful information: the customer is telling you what's still unclear or worrying them.

Heard

people who feel

listened to become less

defensive and more

open

MULTIPLE EXPERIMENTS

Listening lowers the wall

Studies by Guy Itzchakov, Avraham Kluger and colleagues found that when people talked to an attentive, non-judging listener, they became less anxious and less defensive, and expressed more balanced views, considering both sides. The same happens with a hesitant customer: arguing hardens the objection, while listening softens it.

Use it: When you hear an objection, your first move is a question, not a rebuttal: "That's fair. Tell me more about that."

Itzchakov, Kluger & Castro, *Personality and Social Psychology Bulletin*, 2017

1 Pause

Take a breath instead of firing back. A calm pause signals that the objection doesn't threaten you.

3 Explore

"Too expensive compared with what you budgeted, or compared with another quote?" Find the real issue under the words.

5 Check

"Does that answer it, or is there something else on your mind?"

2 Acknowledge

"That's a fair concern." You're not agreeing that they're right; you're showing you heard it.

4 Respond honestly

Answer the real concern with facts, or admit when it's a real limitation.

"IT'S TOO EXPENSIVE."

"Fair. Too expensive compared with your budget, or with another option you're looking at?"

"Would it help to look at a smaller version that fits the budget and grows later?"

"If cost is the main thing, the other company's basic plan may honestly suit you better."

"LET ME THINK ABOUT IT."

"Of course. What's the part you're still weighing?"

"Would a one-page summary help you think it through, or share it with your partner?"

"When would be a good time for me to check back? Or would you rather reach out to me?"

"WE'RE HAPPY WITH WHAT WE HAVE."

"That's great to hear. What do you like most about it?"

"If anything ever changes, I'm glad to be a second opinion."

"Mind if I check in next year when your contract comes up?"

MYTH

"Every no is just a 'not yet.' Keep pushing."

Repeated pressure after a clear no damages the relationship and your reputation, and in some industries and places it can break consumer-protection or do-not-call rules.

WHAT HOLDS UP

A graceful no keeps the door open.

Customers remember how you handled their no. "Thanks for being straight with me. If anything changes, you know where to find me" is often the start of a future sale or referral.

DEEP DIVE

Going further: Hesitation, objections and "no"

WHY IT WORKS

Under pressure, people defend their position harder, which is why arguing with an objection usually makes it stronger. Curiosity does the opposite: it lets the customer explain, and in explaining they often clarify what they actually need. Sometimes the real answer is that your product isn't the right fit. Saying so honestly is what makes you the neighbor people trust, not just another salesperson.

BUSINESS SCENARIO

A restaurant owner tells a food supplier's rep: "Your prices are higher than my current supplier."

WEAK APPROACH

"Our quality is much better, though. You get what you pay for. I can knock off 5% if you sign today."

STRONG APPROACH

"That's true for some items. Which ones matter most to you?" (Owner: "Produce. We waste a lot when it shows up bruised.") "How much would you guess you toss a week? Let's compare the cost per usable pound instead of per case."

Why the strong version works: An instant discount teaches the customer your first price wasn't real. Exploring the objection found a real problem (waste) where the rep might genuinely be the better value.

COMMON MISTAKES

- Arguing with the objection
- Discounting at the first sign of hesitation
- Badmouthing the competitor they currently use
- Treating "no" as a challenge to overcome

PRACTICE THIS WEEK

Write down the three objections you hear most. For each, write one exploring question you'll ask before you respond.

SOURCES

- Itzchakov et al. (2017), The listener sets the tone: high-quality listening increases attitude clarity

Stay in touch the way a good neighbor does

Most salespeople either vanish after the first conversation or follow up with "just checking in" until the customer stops answering. The trusted neighbor does something different: they reach out when they have something useful, remember what matters to you and check that the purchase actually worked out.

Underestimated

EXPERIMENTS, 5,900+ PEOPLE

people appreciate being
reached out to more
than senders expect

A short, unexpected check-in means more than you think

In a series of experiments with more than 5,900 participants, Peggy Liu and colleagues found that people consistently underestimated how much others appreciated being contacted with a short message, a note or a small gift. The gap was largest when the contact was a surprise and when the relationship was weaker, which describes many customer relationships.

Use it: Don't let fear of being a bother stop a genuine check-in. "I saw this and thought of your expansion project" is welcome far more often than you'd guess, as long as it's real and not a disguised pitch.

Liu, Rim, Min & Min, *Journal of Personality and Social Psychology*, 2022

Voice

a call builds a stronger
connection than text,
and isn't as awkward as
people fear

MULTIPLE EXPERIMENTS

For important follow-ups, call

Amit Kumar and Nicholas Epley found people expected phone calls to be more awkward than email, so they chose email, even though calls created stronger feelings of connection and weren't actually more awkward. (See Phone & voicemail.)

Use it: After a sale, a two-minute call to make sure everything arrived and works does more for the relationship than a survey email.

Kumar & Epley, *Journal of Experimental Psychology: General*, 2021

WHEN	FOLLOW-UP	EXAMPLE
Same day	Thank-you and recap	"Thanks for your time today, Dana. As promised, here's the pricing sheet and the two options we discussed."
When you promised	Exactly what you said you'd send	"Here's the case study from the firm your size that I mentioned."
After a "let me think"	One helpful nudge, then let it rest	"No rush at all. One thing that might help: here are answers to the questions most people ask at this stage."
First week after purchase	Make sure it works	"Just making sure the setup went smoothly. Anything confusing so far?"
Every few months	Something useful, not a pitch	"Saw this article on the new tax deadline changes and thought of you."
Milestones	A personal note	"Congratulations on the new office! Hope the move went smoothly."
After a clear no	Respect it	"Understood, and thank you for telling me. Would it be all right if I checked in when your contract renews next year?"

FEELS LIKE A NEIGHBOR

- Mentions something they told you last time
- Brings value: an idea, an introduction, a tip
- Short, with no attachment they didn't ask for
- Easy to ignore without guilt

FEELS LIKE A PITCH

- "Just checking in!" with nothing new
- "Did you get my last three emails?"
- A new promotion every week
- Guilt: "I haven't heard back from you..."

ASKING FOR REFERRALS NATURALLY

"I'm glad it's working well. If you know anyone dealing with the same booking headaches, I'd be happy to help them too."

"Would you be comfortable if I mentioned you as a reference to one or two firms your size?"

DEEP DIVE

Going further: Follow-up that feels like friendship

WHY IT WORKS

Friendship is built on small, repeated, low-pressure contacts where both sides get something out of it. Pushy follow-up only takes: it asks for attention and gives nothing. Neighborly follow-up gives: useful information, a personal note, proof you remember. Over months, that turns a one-time buyer into a long-term customer who sends you referrals, which is the most natural sale there is.

BUSINESS SCENARIO

Three months ago a prospect said, "Not right now, maybe next year."

WEAK APPROACH

A monthly email: "Just checking in to see if anything has changed! We have a special offer this month."

STRONG APPROACH

One email four months later: "Hi Dana, you mentioned tax season is your busiest stretch. Here's a short checklist other firms use to cut no-shows during that time. No need to reply. Hope it's a smooth season."

Why the strong version works: It shows you remembered, gives real value and asks for nothing. When the timing is right, you're the first person they think of.

COMMON MISTAKES

- "Just checking in" with nothing new to offer
- Following up so often it feels like chasing
- Disappearing once the contract is signed
- Adding people to a mailing list without asking

PRACTICE THIS WEEK

Pick five past customers or prospects. For each, send one short message with something genuinely useful and no request attached. Track how many reply.

SOURCES

- American Psychological Association (2022) on Liu et al., people underestimate how much others appreciate being reached out to
- ScienceDaily (2020) on Kumar & Epley, voice vs. text connection

PART 7

Business consulting

How to apply everything in this guide to consulting: earning a client's trust, asking the right questions, holding conversations people enjoy, keeping an audience's attention, and making recommendations clients actually act on.

1. Your consulting path through this guide
2. What clients need from a consultant
3. Client interviews & diagnosis
4. Holding conversations that flow
5. How long before an audience tunes out
6. What to talk about to keep people engaged
7. Recommendations clients act on

Consultants are paid for expertise, but hired again for communication

A consultant's analysis only creates value when a client understands it, believes it and acts on it. That makes consulting one of the most communication-heavy jobs in business. This topic maps the rest of the guide to each stage of a consulting engagement, gives you a study track, and lists what to watch out for.

Social skills

paired with analytical skills were the best-paid combination in the job market

LARGE LABOR-MARKET STUDY

Analysis plus people skills is the winning combination

Economist David Deming found that from 1980 to 2012, U.S. jobs needing both strong math or analytical skills and strong social skills grew fastest in employment and pay. Jobs needing only analytical skills did less well. Consulting is a clear example of that combination: the analysis gets you to an answer, and communication gets the client to act on it. (See Core skills.)

Use it: Budget your time accordingly. On many projects, preparing how you'll explain and discuss the findings deserves as much attention as the analysis itself.

Deming, *Quarterly Journal of Economics*, 2017

ENGAGEMENT STAGE	STUDY THIS TOPIC	WHAT IT DOES FOR YOU
Winning the work	From salesperson to trusted neighbor, Networking	Being trusted before you're hired
Scoping and contracting	What clients need from a consultant, Negotiation	Clear expectations that prevent later conflict
Interviews and data gathering	Client interviews & diagnosis, Listening	Finding the real problem, not the stated one
Everyday client conversations	Holding conversations that flow	Relationships that feel easy, not transactional
Status updates and email	Email that gets answered, Frameworks (BLUF)	Clients always know where things stand
Workshops and presentations	How long before an audience tunes out, What to talk about, Building a presentation	Rooms that stay with you to the end
Delivering findings	Recommendations clients act on, Difficult conversations	Hard truths delivered so they're heard
Resistance and politics	Pushing back without a fight, Emotion at work	Staying calm and credible under pressure
International clients	Cross-cultural business	Adjusting directness, pace and hierarchy
Remote engagements	Remote & hybrid work	Keeping workshops engaging on video

AN ORGANIZED PATH

The 6-week consulting track

About 20 minutes a day of study, plus one deliberate practice moment each week with a real client, colleague or classmate.

WEEK 1 **The consulting role**

This section's first two topics, plus core skills and your communication style

WEEK 2 **Listening and diagnosis**

Client interviews, listening, holding conversations that flow

WEEK 3 **Writing for clients**

Email, tone, better wording, frameworks (BLUF and SCQA)

WEEK 4 **Holding a room**

Attention research, what to talk about, capturing attention, making it stick

WEEK 5 **Recommendations and resistance**

Recommendations clients act on, difficult conversations, pushback, emotion

WEEK 6 **Long-term client relationships**

Culture, apologies, networking, follow-up

WHAT TO LEARN FIRST

- Asking open questions and listening to the answer
- Stating a conclusion in one sentence
- Turning data into a short story with a recommendation
- Running a meeting with a clear goal and decision
- Saying "I don't know yet, I'll find out by Friday"

WHAT TO WATCH OUT FOR

- **Scope creep:** "While you're here, could you also..."
- **The hidden client:** the person who hired you isn't the one who must change
- **Answer shopping:** the client wants you to confirm a decision already made
- **The expert trap:** using jargon and data to sound smart instead of being clear
- **Silent resistance:** nodding in meetings, no action afterward

HABITS OF TRUSTED CONSULTANTS

- Write a one-page recap after every client meeting
- Flag bad news early, with a plan
- Give credit to client team members
- Under-promise on dates, over-deliver on clarity
- Ask "What would make this useful to you?" often

DEEP DIVE

Going further: Your consulting path

WHY IT WORKS

Clients rarely judge consultants on the quality of the analysis alone, partly because they often can't evaluate it. They judge what they can see: whether the consultant understood their situation, explained things clearly, kept them informed and made their lives easier. Communication is how your expertise becomes visible, and it's usually why clients call you back.

BUSINESS SCENARIO

A first-time consultant finishes a strong cost analysis for a small manufacturing client, but the owner seems unconvinced.

WEAK APPROACH

Sending a 40-slide deck with every chart from the analysis, followed by a 90-minute walkthrough of the methodology.

STRONG APPROACH

A 20-minute conversation that opens with one sentence ("You can save about \$80,000 a year by consolidating two suppliers"), shows three supporting charts, names the main risk, and ends with a question: "What would you need to see to feel comfortable trying this?"

Why the strong version works: The owner can now see the answer, the evidence and the risk in one sitting, and is invited into the decision instead of being lectured.

COMMON MISTAKES

- Treating communication as something you do after the "real work"
- Showing all your work instead of your conclusions
- Waiting until the final presentation to share findings
- Assuming the client will tell you when they're confused

PRACTICE THIS WEEK

Take one piece of analysis you've done recently, for work or school. Summarize it in one sentence a client could repeat to their boss.

SOURCES

- Deming (2017), The growing importance of social skills in the labor market, NBER

Your job isn't just to be right. It's to get your expertise used.

Clients hire consultants for an outside view, specialized skills or extra hands. But a correct recommendation that's ignored creates no value. The consulting process is built around one question: how do I help this client understand their situation and act on it?

5 phases

of a consulting engagement, each with its own conversation

PRACTITIONER FRAMEWORK

Most consulting failures start at the beginning

In *Flawless Consulting*, a long-standing guide for consultants, Peter Block describes five phases: **entry and contracting** (agreeing on goals, roles and what each side will provide), **discovery** (gathering data), **feedback and decision** (sharing findings and deciding what to do), **implementation**, and **extension or exit**. Block argues that many problems blamed on the client, such as resistance or missing data, can be traced to a weak contracting conversation at the start. It's a framework from decades of practice rather than controlled research, but it's widely taught.

Use it: Before any work starts, get agreement in writing on the problem, the deliverables, who you'll have access to, how decisions will be made and what the client will contribute.

Block, *Flawless Consulting*, 4th ed., 2023

Ask, don't tell

clients reveal the real problem when you ask humbly

PRACTITIONER FRAMEWORK

Humble inquiry: the consultant's most useful habit

MIT professor Edgar Schein, one of the founders of organizational psychology, argued that consultants and leaders too often "tell" when they should ask. His approach, called humble inquiry, means asking questions you don't already know the answer to, out of genuine curiosity, so the client can think through and explain their own situation. Schein found that the problem a client first describes is often not the real one, and that the client usually knows more about their organization than the consultant ever will.

Use it: In early meetings, replace "Here's what you should do" with "Tell me more about how that happened" and "What have you already tried?"

Schein, *Humble Inquiry*, 2013; *Process Consultation Revisited*, 1999

1 Entry and contracting

"What would success look like at the end of this? Who else needs to agree? What can your team provide, and by when?"

3 Feedback and decision

Present a few clear findings, invite reactions, and help the client decide. Expect and welcome pushback.

5 Extension or exit

Review what worked, hand off knowledge, and either extend the work or leave cleanly with the door open.

2 Discovery

Interviews, data and observation. Share early impressions as you go, so nothing in the final report is a surprise.

4 Implementation

Agree on owners, dates and how progress will be checked. The client's people do most of the work.

INTERACTIVE TOOL

Engagement brief builder

Use this tool on the Clear at Work website.

DEEP DIVE

Going further: What clients need from a consultant

WHY IT WORKS

Clients bring consultants in when something feels stuck, which usually means emotions, politics and uncertainty are involved, not just a technical gap. A consultant who only delivers answers ignores most of what's keeping the client stuck. Clear contracting reduces uncertainty, humble questions surface the real issue, and involving the client throughout means the final recommendation feels like theirs. People act on what they helped create.

BUSINESS SCENARIO

Two weeks into a project, a client asks the consultant to "also take a quick look" at their marketing budget.

WEAK APPROACH

"Sure, no problem!" The consultant squeezes it in, the original deadline slips, and the client is frustrated about the delay.

STRONG APPROACH

"Happy to help with that. It's outside what we agreed, so let's decide together: I can add it after the operations work wraps up on March 15, or we can adjust the timeline now. Which matters more to you?"

Why the strong version works: It's helpful without being a pushover, it refers back to the agreement and it lets the client make the trade-off with full information.

COMMON MISTAKES

- Starting work without written agreement on scope and success
- Accepting the client's diagnosis without checking it
- Doing the work for the client instead of with them
- Saying yes to every "small" extra request

PRACTICE THIS WEEK

For a current project (work, school or volunteer), write a five-line brief: problem, success measure, in scope, out of scope, due date. Share it with the person you're helping and ask, "Did I get this right?"

SOURCES

- Review of *Flawless Consulting* by Peter Block, phases of consulting
- Summary of Edgar Schein, *Humble Inquiry: The Gentle Art of Asking Instead of Telling*

The first problem a client describes is rarely the whole problem

Interviews with the client's staff, customers and leaders are the consultant's main way of learning what's really going on. Done well, they also build trust and early buy-in, because people support changes they had a voice in.

Rewarding

talking about ourselves
activates the brain's
reward system

BRAIN IMAGING AND EXPERIMENTS

People enjoy sharing their views, so give them the chance

Harvard researchers Diana Tamir and Jason Mitchell found that talking about one's own thoughts and opinions activated brain regions associated with reward. In one experiment, people even gave up small amounts of money to answer questions about themselves rather than about other people. In interviews, this works in your favor: most staff are glad to explain how their work really happens, if you ask well and listen.

Use it: Start interviews with questions about the person's own role and views ("What does a normal week look like for you?"), not about the problem. It warms them up and gives you context.

Tamir & Mitchell, *PNAS*, 2012

A 30-minute interview, in order

Set up (2 min): "I'm here to understand how things work, not to evaluate anyone. I'll share themes, not names."

Their role: "Walk me through a typical week."

What works: "What's working well that we shouldn't break?"

What doesn't: "Where do things get stuck? Can you give me a recent example?"

Causes: "Why do you think that happens?" Then ask why again.

Impact: "What does that cost you, the team or customers?"

Ideas: "If you were in charge for a month, what would you change first?"

Close: "What should I have asked that I didn't? Who else should I talk to?"

LISTEN FOR

- The same complaint from people in different roles
- Stories that contradict the official process
- Workarounds ("We just keep a spreadsheet on the side")
- Hesitation or changing the subject

CHECK BEFORE YOU CONCLUDE

- Does the data match what people told you?
- Did you hear from people at every level?
- Is this the cause, or a symptom of something else?
- Could you be hearing what you expected to hear?

PROTECT TRUST

- Keep promises about confidentiality
- Report themes, not who said what
- Never repeat one interviewee's criticism to another
- Thank people and tell them what happens next

DEEP DIVE

Going further: Client interviews & diagnosis

WHY IT WORKS

People who do the work every day know where it breaks, but they're rarely asked in a way that feels safe. A neutral opening, a promise of confidentiality and genuine follow-up questions lower the risk of speaking honestly. Asking "why" more than once moves past the polite surface answer. Comparing what different people say, and checking it against data, keeps you from mistaking one loud opinion for the truth.

BUSINESS SCENARIO

A warehouse supervisor says, "Orders are late because we don't have enough staff."

WEAK APPROACH

Writing "understaffed" in the notes and moving to the next question.

STRONG APPROACH

"Tell me about the last time an order was late. What happened, step by step?" (The supervisor describes waiting two hours for a customer-service team to confirm addresses.)
"How often does that happen?"

Why the strong version works: A specific example reveals a handoff delay that more staff wouldn't fix. Asking for real stories gets you closer to the cause than asking for opinions.

COMMON MISTAKES

- Interviewing only managers
- Leading questions that confirm your hypothesis
- Talking more than the interviewee
- Breaking confidentiality, even accidentally

PRACTICE THIS WEEK

Interview one coworker or classmate for 15 minutes about how a process works for them. Ask "Can you give me a recent example?" at least three times.

SOURCES

- Tamir & Mitchell (2012), Disclosing information about the self is intrinsically rewarding, *PNAS*

Good conversation is a skill, not a personality trait

Consultants spend much of their day in conversation: client calls, hallway check-ins, lunches, networking events. The people others enjoy talking to tend to do a few things consistently: they ask follow-up questions, share the airtime, offer real opinions and know how to end gracefully. Each of those can be learned.

Follow-ups

questions that build on the answer increase how much people like you

MULTIPLE STUDIES, INCL. SPEED DATING

The follow-up question is the most underused tool in conversation

Karen Huang, Alison Wood Brooks and colleagues analyzed chats between strangers and speed dates. People who asked more questions, especially follow-up questions that built on what the other person had just said, were liked more. In speed dating, people who asked more follow-up questions were more likely to get a second date. Follow-ups show you were listening.

Use it: After someone answers, ask about what they just said before changing the subject: "You mentioned you moved from finance to operations. What made you switch?"

Huang, Yeomans, Brooks, Minson & Gino, *Journal of Personality and Social Psychology*, 2017

2%

of conversations ended when both people wanted them to

TWO STUDIES, 932 CONVERSATIONS

Conversations almost never end at the right time

Adam Mastroianni and colleagues at Harvard studied 932 conversations, some between strangers in a lab and some everyday conversations reported in a survey. Only about 2% ended when both people wanted them to. In many, both people wanted to stop earlier but neither said so. People were also poor at guessing how long their partner wanted to talk.

Use it: Don't take a conversation's length as a sign of interest, and give people easy exits: "I know you've got a busy afternoon, so I'll let you go. This was really helpful."

Mastroianni, Gilbert, Cooney & Wilson, *PNAS*, 2021

CONVERSATION HABITS

Six habits of people others enjoy talking to

1. **Ask, then follow up.** One follow-up question on their answer is worth three new topics.
2. **Share the airtime.** If you've been talking for more than a minute, hand the conversation back with a question.
3. **Offer something of yourself.** Questions alone feel like an interview. Add a short story or opinion so it's an exchange.
4. **Have opinions.** "Interesting" and "it depends" end threads. "I think the second option is stronger, because..." starts them.
5. **Pick up threads.** Listen for the detail they lingered on, like a trip, a project or a frustration, and come back to it.
6. **End on a high note.** Leave while it's still going well, with a specific thank-you or next step.

OPENERS THAT WORK IN BUSINESS

"What are you working on these days that you're excited about?"

"How did you end up in this field?"

"What's the biggest thing on your plate this quarter?"

"What did you think of the last session?" (at events)

FOLLOW-UPS THAT KEEP IT GOING

"How did that turn out?"

"What was the hardest part?"

"What surprised you?"

"What would you do differently next time?"

GRACEFUL EXITS

"I've really enjoyed this. I'll let you get back to your day."

"I promised myself I'd say hi to a few people. Can we pick this up over coffee?"

"I'll send you that article tomorrow. Great talking with you."

DEEP DIVE

Going further: Holding conversations that flow

WHY IT WORKS

A conversation feels good when both people feel heard and both get to contribute. Follow-up questions prove you're listening; sharing your own views gives the other person something to respond to; a graceful ending leaves both of you with a good final impression. The flow comes from responding to what was actually said, rather than waiting for your turn to talk.

BUSINESS SCENARIO

At a client dinner, the CFO mentions she just got back from visiting a supplier in Mexico.

WEAK APPROACH

"Oh nice. I was in Mexico City last year. The food was incredible, and we went to..." (Five minutes about your own trip.)

STRONG APPROACH

"How did the visit go? What were you hoping to learn there?" (She explains quality concerns.)
"That sounds like a big decision. What would make you comfortable staying with them?"

Why the strong version works: Following her thread keeps the conversation about something she cares about, and often surfaces business priorities you'd never hear in a formal meeting.

COMMON MISTAKES

- Turning every story back to yourself
- Firing new questions without reacting to answers
- Never offering an opinion
- Staying too long because leaving feels awkward

PRACTICE THIS WEEK

In three conversations, ask two follow-up questions before you share anything about yourself. Then end each one with a specific thank-you.

SOURCES

- Huang et al. (2017), It doesn't hurt to ask: question-asking increases liking
- Harvard Gazette (2021) on Mastroianni et al., do conversations end when people want them to?

Attention doesn't fall off a cliff at 10 minutes. It flickers from the start.

You've probably heard that audiences stop listening after 10 minutes, or that people now have the attention span of a goldfish. The research tells a more useful story: attention starts drifting within the first minutes, comes and goes in cycles, declines over a long talk, and can be reset by changing what the audience is doing.

MYTH

~~"People have an 8-second attention span, shorter than a goldfish."~~

This widely repeated number traces back to a 2015 marketing report that cited a website, which in turn cited a small web-browsing study that didn't measure attention span at all. No credible research supports it.

MYTH

~~"Audiences can pay attention for exactly 10 to 15 minutes."~~

Psychologists Karen Wilson and James Korn traced this claim to its sources in 2007 and found the evidence weak: mostly observations and studies that measured attention only indirectly. Attention varies with the speaker, the topic and the audience.

30 sec

into a lecture, some listeners already reported a lapse in attention

CLASSROOM STUDY

Attention comes and goes in shrinking cycles

Diane Bunce and colleagues gave chemistry students clickers to report, privately, whenever they noticed their attention had lapsed. Some lapses came just 30 seconds into a lecture, more around four and a half minutes, and then they came in cycles that got shorter as the lecture went on. Most lapses were brief, a minute or less. Lapses were less frequent during demonstrations and questions, and fewer in the lecture segment right after an activity than before it.

Use it: Don't wait 10 minutes to re-engage people. Build in small changes of pace throughout, and use an activity to "reset" attention before your most important content.

Bunce, Flens & Neiles, *Journal of Chemical Education*, 2010

6.0 → 4.9

self-rated attention
from the first to the last
5 minutes of a 40-
minute lecture

SMALL STUDY, 21 STUDENTS

Attention and memory decline across a long talk, and a story can bring them back

Jonathan Farley, Evan Risko and Alan Kingstone asked students to rate their attention every 5 minutes during a 40-minute video lecture and tested what they remembered. Attention dropped over time, and so did memory: students retained less from the second half. One block broke the pattern: the one containing a memorable personal anecdote, which students remembered unusually well. Lower attention explained the drop in memory.

Use it: Put your key message early, and plan a story or example for the second half of any long talk, where attention is lowest.

Farley, Risko & Kingstone, *Frontiers in Psychology*, 2013

~Half

as much mind
wandering when short
quizzes broke up an
online lecture

RANDOMIZED EXPERIMENTS

Asking the audience to do something keeps them with you

Karl Szpunar, Novall Khan and Daniel Schacter split a 21-minute online lecture into four segments. Viewers who answered a few quick questions on the material after each segment reported about half as much mind wandering (versus about 40% for others), took more notes and remembered more on a final test. Simple breaks or re-watching the material didn't produce the same benefit.

Use it: Every 5 to 10 minutes, ask the audience to do something: answer a question, make a prediction, apply an idea to their own situation.

Szpunar, Khan & Schacter, *PNAS*, 2013

47%

of waking hours,
people's minds were
wandering

LARGE EXPERIENCE-SAMPLING STUDY

Mind wandering is the default, not a sign your talk is bad

Harvard researchers Matthew Killingsworth and Daniel Gilbert used a phone app to ask about 2,250 adults, at random moments, what they were doing and thinking. People's minds were wandering about 47% of the time, across nearly every activity. Your audience isn't uniquely distracted; drifting is how human attention works.

Use it: Repeat your main point at the start, middle and end. Someone will have missed it the first time.

Killingsworth & Gilbert, *Science*, 2010

LENGTH	MAIN RISK	PLAN
Under 5 minutes (update, pitch)	Losing them before the point	Lead with the conclusion in the first 30 seconds. One example. One ask.
10 to 20 minutes (briefing, talk)	Drifting during detail	Main point early, a reset at about the halfway mark, recap at the end. TED caps talks at 18 minutes for this reason.
30 to 60 minutes (meeting, workshop session)	A long slide in the middle	Change activity every 5 to 10 minutes: question, story, pairs discussion, demo, poll.
Half day or full day (workshop)	Fatigue after lunch	Sessions of 60 to 90 minutes with real breaks; most hands-on work right after lunch; key decisions in the morning.

INTERACTIVE TOOL

Attention pacing planner

Use this tool on the Clear at Work website.

DEEP DIVE

Going further: How long before an audience tunes out

WHY IT WORKS

Listening to one person talk is passive, and passive attention fades and flickers. A change of activity (a question, a story, a demo, a discussion) forces the brain to re-engage and gives people a fresh starting point. That's why the fix isn't to talk faster or louder; it's to stop talking at regular intervals and give the audience something to do or think about.

BUSINESS SCENARIO

A consultant has 45 minutes to present a process review to a client's leadership team after lunch.

WEAK APPROACH

Thirty-five minutes of slides walking through the methodology and every finding, then "Any questions?" with ten minutes left.

STRONG APPROACH

Recommendation in the first minute. A quick poll ("Guess how many handoffs an order goes through"). Three findings, each with a short customer story. A five-minute pairs discussion: "Which of these would hurt most to fix?" Recap and decision at the end.

Why the strong version works: The audience is never passive for more than about seven minutes, and the main message is stated at the start, when attention is highest, and repeated at the end.

COMMON MISTAKES

- Saving the main point for the end
- Long stretches of one-way talking
- Holding all questions until the end
- Scheduling the most important content right after lunch

PRACTICE THIS WEEK

Take your next presentation and mark every place you'll talk for more than seven minutes without a change. Add a question, story or activity to each.

SOURCES

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People pay attention to what's about them, what's surprising, and what's a story

Pacing keeps attention from fading; content gives people a reason to pay attention in the first place. Research points to a few kinds of content that reliably hold interest, and a few that reliably lose it.

Self-reference

information connected to ourselves is remembered better

META-ANALYSIS

Make it about them

Psychologists have found for decades that people remember information better when they relate it to themselves, a pattern called the self-reference effect. A 1997 meta-analysis by Cynthia Symons and Blair Johnson combined 129 studies and confirmed it is reliable. For a speaker, it means content framed around the audience's own situation, numbers and decisions is more likely to stick than general information.

Use it: Turn general points into personal ones: not "Late shipments hurt retention" but "Think about your three biggest customers. Which one would you lose first?"

Symons & Johnson, *Psychological Bulletin*, 1997

Stories

pull listeners in and lower their resistance to the message

WIDELY REPLICATED

A story transports people

Melanie Green and Timothy Brock found that when people become absorbed, or "transported," into a story, they're more likely to accept the beliefs it carries and less likely to pick it apart. Later research has supported the idea across many settings. Stories also break up abstract content: in the lecture study above, the block with a personal anecdote was the best remembered.

Use it: Back each key point with a short, true story about a real person: a customer, an employee, a similar company. Keep it under a minute and tie it back to the point.

Green & Brock, *Journal of Personality and Social Psychology*, 2000

"No opinions"

was among the traits people most associated with boring people

MULTIPLE STUDIES

What makes someone seem boring

Wijnand van Tilburg and colleagues asked people in the U.S. and U.K. what makes someone boring. The most typical traits were lacking interests, lacking humor and having no opinions. People rated these "boring" individuals as less warm and less competent, and said they would avoid spending time with them. These are stereotypes, not facts about real people, but they show what audiences react against.

Use it: Take a position. "Here's what I'd do, and why" holds attention far better than a neutral list of pros and cons.

Van Tilburg et al., *Personality and Social Psychology Bulletin*, 2022

HOLDS ATTENTION	LOSES ATTENTION
Their problem, their numbers, their customers	Your methodology and how hard the analysis was
A real story about a person	Abstract principles with no example
A surprising fact that challenges what they assumed	Things everyone in the room already knows
An open question you'll answer later in the talk	Giving every answer before anyone wonders
A clear opinion with reasons	"There are pros and cons to everything"
A decision they'll need to make	Background they don't need to act
Concrete words: "\$80,000," "Monday mornings," "three handoffs"	Jargon: "synergies," "optimization," "leveraging"
Questions they can answer from experience	Questions with a "right" answer that put people on the spot

THE ENGAGEMENT FORMULA

For any point you want people to remember

1. **Hook:** a question, surprising number or tension. "Guess how many times an order changes hands before it ships."
2. **Point:** one sentence. "It's 11, and each handoff adds about a day."
3. **Story:** a real example. "Last Tuesday, a \$40,000 order sat for two days waiting on one signature."
4. **Meaning for them:** "For your top 20 customers, that's the difference between renewing and shopping around."
5. **Involve them:** "Where have you seen this in your own team?"

DEEP DIVE

Going further: What to talk about

WHY IT WORKS

Attention follows relevance and curiosity. Content about the listener's own situation feels important; surprises and open questions create a gap the mind wants to close (see Capturing attention); stories give the brain something concrete to follow. Content that's about the speaker, already known or purely abstract offers none of these, so the mind wanders to something that does.

BUSINESS SCENARIO

A consultant opens a workshop for a hospital's nursing managers on scheduling changes.

WEAK APPROACH

"Good morning. Today I'll walk you through our firm's scheduling optimization framework, which has five phases. Phase one is data collection..."

STRONG APPROACH

"Raise your hand if you've rebuilt a schedule at 10 p.m. because of a last-minute call-out. (Most hands go up.) Last month, your units did that 46 times. Today we'll look at three changes that could cut that in half, and I'd like your help picking which to try first."

Why the strong version works: It starts with their experience, uses their own number, promises something they want and invites them into the decision, all in under 30 seconds.

COMMON MISTAKES

- Opening with your agenda or credentials
- Explaining your process instead of their results
- Stories with no clear point
- Staying neutral when the audience wants your view

PRACTICE THIS WEEK

Rewrite the opening 30 seconds of your next presentation so it's about the audience: their experience, their number or their decision.

SOURCES

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A recommendation isn't finished until someone acts on it

The final presentation is where many consulting projects quietly fail: the client nods, thanks you and files the report. Recommendations get used when they're clear, when they connect to what the client already cares about, and when the people who must carry them out helped shape them.

2.5%

of songs guessed by listeners, when tappers predicted 50%

CLASSIC EXPERIMENT

The curse of knowledge: experts forget what it's like not to know

In a 1990 Stanford study by Elizabeth Newton, one person tapped the rhythm of a well-known song and another tried to guess it. Tappers predicted listeners would guess about half the songs. Listeners got 3 out of 120, about 2.5%. The tappers heard the melody in their heads; the listeners heard only knocking. Consultants face the same gap: after weeks inside a problem, your conclusions feel obvious, but the client hears only the "knocking."

Use it: Test your key slides on someone outside the project. If they can't explain the main point back to you, simplify it.

Newton, Stanford University dissertation, 1990; described by Heath & Heath, *Harvard Business Review*, 2006

MYTH

~~"70% of all change initiatives fail."~~

This number appears in countless consulting decks. Mark Hughes reviewed the sources behind it in 2011 and found "no valid and reliable empirical evidence" to support it. Change is hard, but don't use this statistic to scare clients.

WHAT HOLDS UP

Involvement and clarity help change stick.

Research on psychological safety and listening, covered elsewhere in this guide, points the same way: people engage with changes they understand and helped shape. Share findings early, invite reactions and let the client's team own the plan.

1 Lead with the answer

One sentence: what you recommend and the main benefit. Use BLUF or SCQA from Frameworks.

2 Three reasons, with evidence

Each with one chart or story, in the client's terms and numbers.

3 Name the risks

What could go wrong and how you'd handle it.
Clients trust advisors who show the downsides.

5 Assign owners

Every action gets a client-side owner and a date.
If no one owns it, it won't happen.

4 Make the first step small

"Start with a 60-day pilot in one warehouse" is
easier to approve than a full overhaul.

6 Invite pushback

"What here worries you most?" Concerns raised
in the room can be answered; concerns left
unspoken become resistance.

DELIVERING AN UNWELCOME FINDING

*"I want to share something that may be hard to
hear, because I think it's the most important
finding."*

*"Several people, across different teams, described
the same issue."*

*"This isn't about anyone doing a bad job. The
process makes it hard to do a good one."*

WHEN THE CLIENT DISAGREES

*"Help me understand what you're seeing that I'm
not."*

*"What would you need to see to be convinced
either way?"*

*"Could we test it on a small scale and let the results
decide?"*

THE EXECUTIVE SUMMARY

- Fits on one page
- States the recommendation in the first line
- Shows the cost, benefit and timeline
- Ends with the decision needed and by when

DEEP DIVE

Going further: Recommendations clients act on

WHY IT WORKS

Clients don't act on recommendations they don't understand, don't trust or didn't help shape. Leading with the answer fights the curse of knowledge; showing risks builds trust; small first steps lower the cost of saying yes; client-side owners turn a report into action. And sharing findings gradually during the project means the final meeting confirms what the client already half-believes, instead of asking them to accept a surprise.

BUSINESS SCENARIO

A consultant's analysis shows the client's favorite product line is losing money.

WEAK APPROACH

Revealing it for the first time on slide 32 of the final presentation, in front of the whole leadership team, with the recommendation to "discontinue the line."

STRONG APPROACH

Sharing the early numbers one-on-one with the CEO two weeks before, asking what might explain them, and then presenting options together: reprice, redesign or phase out over a year, with the trade-offs of each.

Why the strong version works: No one is surprised or embarrassed in public, the CEO's knowledge improves the analysis, and the options let the client choose instead of defending.

COMMON MISTAKES

- Saving surprises for the final presentation
- Twenty recommendations with no priorities
- No owners or dates for next steps
- Using jargon the client's team doesn't use

PRACTICE THIS WEEK

Write a one-page executive summary for a project or class assignment. Ask someone unfamiliar with it to read it for 60 seconds and tell you the recommendation.

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Glossary

Active listening

Listening to understand, then reflecting back what you heard and asking open questions.

Affect labeling

Putting a feeling into words, such as "I'm frustrated," which can help calm it.

Ambivert

Someone in the middle of the introversion–extraversion range. In one study, ambiverts outsold both introverts and strong extraverts.

Assertiveness sweet spot

The finding that leaders who are too passive or too forceful are both seen as less effective.

Async communication

Communication that doesn't require people to be available at the same time, like written updates or recorded videos.

Attention reset

A change of activity, such as a question, story or discussion, that re-engages an audience during a talk.

Autonomy support

Explaining reasons, offering choices and acknowledging someone's view. Combined with clear structure, it boosts engagement.

BATNA

Best Alternative To a Negotiated Agreement: what you'll do if the deal falls through. It sets your walk-away point.

BLUF

Bottom Line Up Front: state your conclusion or request first, then the supporting details.

Channel richness

How many cues a communication channel carries. In-person is richest; email and chat carry the fewest.

Commitment and consistency

People tend to act in line with what they've already said or done.

Concrete language

Specific words people can picture, like "your gray T-shirt" instead of "that item." It makes people feel heard and remember more.

Contracting (consulting)

The opening conversation of an engagement where client and consultant agree on the problem, success, scope, access and roles.

Conversational receptiveness

Language that shows you're genuinely open to someone who disagrees. It lowers conflict.

Cooling-Off Rule

A U.S. FTC rule giving buyers three business days to cancel many door-to-door and off-site sales.

Curiosity gap

The pull people feel to close a gap between what they know and want to know. Curiosity improves memory.

Curse of knowledge

Once you know something, it's hard to imagine not knowing it, so experts overestimate how clear they are.

Discovery

The part of a sales conversation where you learn the customer's situation, problems and goals before recommending anything.

Door-in-the-face

Making a large request first, then a smaller one, which then feels like a fair concession.

Double bind

A situation where a behavior is judged negatively either way, such as self-promoting women seen as competent but less likable.

Elderspeak

Patronizing, overly simple speech directed at older adults. It tends to trigger resistance.

Elevator pitch

A 20–30 second introduction covering who you are, what you do, a proof point and what you're looking for.

Emotion dial

This site's four-level guide to how much emotion to show: cool, measured, warm or all in.

Emotional contagion

The way one person's mood spreads to others in a group, shaping cooperation and conflict.

Endowed progress

A head start toward a goal increases the chance people finish it.

Escalation ladder

Four steps for raising a problem: light touch, private conversation, written follow-up, then manager or HR.

Foot-in-the-door

Starting with a small request makes people more likely to agree to a larger one later.

Forgetting curve

The pattern of memory fading quickly after learning, then leveling off, unless information is reviewed.

Framing

Presenting the same facts in different terms, such as gains versus losses, which changes decisions.

Goal gradient

People speed up their effort as they get closer to a goal.

Harsh startup

Opening a difficult conversation with criticism or sarcasm, which tends to make it end badly.

HEAR

Hedge your claims, Emphasize agreement, Acknowledge the other view, Reframe positively: a guide to receptive disagreement.

High-context communication

Communication where meaning relies heavily on relationship, setting and what's left unsaid.

Humble inquiry

Edgar Schein's approach of asking genuine questions you don't know the answer to, instead of telling.

Hype words

Promotional adjectives like "innovative" or "world-class" that add enthusiasm but no information.

Interleaving

Mixing different topics or problem types in one study session. It feels harder but improves long-term learning.

Leitner system

A flashcard method that moves known cards to boxes reviewed less often and missed cards back to the start.

Liking gap

The tendency to underestimate how much people enjoyed talking with us.

Low-context communication

Communication where the meaning is mainly in the explicit words.

Maturity gap

The finding that reasoning reaches adult levels around 16, while self-regulation under pressure keeps developing into the early 20s.

Mind wandering

Attention drifting away from the task to unrelated thoughts; one large study found it in about 47% of waking moments.

Mind-wandering

Thinking about something other than the task at hand. It happens close to half of waking hours.

Narrative transportation

Becoming absorbed in a story, which makes listeners more receptive to its message.

Nominalization

A verb hidden inside a noun, like "make a decision" instead of "decide." It makes writing wordier and weaker.

Passive voice

Phrasing that hides who did the action, like "mistakes were made." Active voice is usually clearer.

Peer effect

The finding that teens take more risks when peers are watching, while adults don't. Important talks with young people go best one on one.

Persuasion knowledge

What people learn over time about persuasion tactics; spotting a tactic makes them more skeptical of the seller.

Positions vs interests

What someone says they want (position) versus why they want it (interest).

Practice testing

Quizzing yourself or recalling from memory. Rated one of the two most effective study techniques.

PREP

Point, Reason, Example, Point: a structure for answering questions on the spot.

Progressive disclosure

Showing the essentials first and revealing detail on demand, so pages aren't overwhelming.

Psychological reactance

The urge to resist when we feel our freedom to choose is threatened, which is why pressure often backfires.

Readability grade level

An estimate of the school grade needed to read a text easily, based on sentence and word length.

Reappraisal

Reframing how you see a situation, such as treating nerves as excitement, to change how you feel about it.

Reciprocity

People feel an obligation to return favors or concessions.

Retrieval practice

Strengthening memory by recalling information rather than re-reading it. Also called the testing effect.

Reverse mentoring

A younger or less experienced person teaching a more senior colleague, often about new tools or trends.

SBI

Situation, Behavior, Impact: a structure for specific, fair feedback.

Scarcity

Things that seem limited feel more valuable.

Scope creep

Extra requests that gradually expand a project beyond what was agreed, often without changing time or budget.

Seductive details

Interesting but irrelevant content that distracts from the main point and reduces learning.

Self-fulfilling prophecy

When expectations about someone shape their behavior to match. Negative expectations of teens are linked to more risk-taking.

Self-reference effect

People remember information better when they relate it to themselves.

Serial position effect

People remember the first and last items in a sequence best.

Social proof

People look to what others like them are doing to decide what to do.

Spacing effect

Spreading reviews out over time improves memory more than cramming.

SPIN questions

Situation, Problem, Implication and Need-payoff questions, a discovery pattern from Neil Rackham's research on successful sellers.

Stakeholder interview

A structured conversation with someone affected by a problem, used by consultants to understand how work really happens.

STAR

Situation, Task, Action, Result: a structure for telling stories in interviews and reviews.

Suppression

Hiding or holding back emotional reactions. It tends to hurt rapport and communication.

Trust equation

A practitioner model: trust grows with credibility, reliability and intimacy, and shrinks with self-orientation.

Two-sided message

A message that acknowledges a drawback and then answers it; often more persuasive than listing only benefits.

Unity

Shared identity makes people more open to influence from those they see as "one of us."

Warmth and competence

The two main dimensions people use to judge others in first impressions. Warmth is judged first.

Weak ties

Acquaintances rather than close contacts. They often connect you to new information and opportunities.

Wise feedback

Critical feedback paired with high standards and belief in the person: "I have high expectations, and I know you can reach them."

Working memory

The small mental workspace that holds about three to five chunks of information at once.

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About the author

SZ

I made this site because I've seen firsthand how much communication shapes what happens at work.

I'm a 23-year-old graduate with a bachelor's degree in business administration. I'm a certified bookkeeper, and I'm currently in an MBA program in professional accounting. Over the years, I've competed in multiple business competitions, including at the state level several times, as well as public presentation competitions.

Along the way, I've been in a lot of tough situations, both at work and while networking in the business world. Again and again, I've seen how many people struggle to communicate, and how poor communication leads to conflict that could have been avoided.

I believe you need education to grow. Communication is a skill anyone can learn, and that's why I made Clear at Work.

— Sebastian L. Zilempe
FOUNDER, CLEAR AT WORK

How the content is made

RESEARCH SUMMARIES

Findings come from published studies, reviews and reputable summaries. Each topic lists its sources so you can read further.

EVIDENCE LABELS

Findings are tagged by strength, from meta-analyses and large studies to small or mixed results, so you know how much weight to give each one.

MYTHS CALLED OUT

Popular claims that don't hold up, like the "8-second attention span," are labeled as myths and explained.

ILLUSTRATIVE EXAMPLES

Scenarios, scripts and model answers are written as examples to show the ideas in action. They aren't research findings.

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