

Creating Good Documents —and Avoiding Bad Ones

Compliance in a Highly Litigious World

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Email Addiction



Pharmaceutical companies today face a variety of managerial challenges related to business writing—email, in particular.

- **Email proliferation.** Email is increasingly replacing other kinds of formal documents—memos, simple reports, formal letters, etc.
- **Email illusions.** Many employees still tend to view email as A) private and personal, B) impermanent, and C) good for venting.
- **Excessive distribution.** Employees tend to apply the most lax standards (including CYA) for whom to “cc:” on any given message.
- **Virtual meetings.** Email has become a medium for impromptu meetings, with groups of employees simultaneously 1) discussing sensitive issues in a casual manner, and 2) creating a near-permanent record of their every thought, speculation, or quip.
- **Records management.** Few employees make efficient use of their email software to manage their records, and despite training efforts, many are still unfamiliar with record retention policies that apply to their areas.

A dearth of leadership

When it comes to email format, style, etiquette, etc., employees have been left to their own devices.



The following problems illustrate this leadership vacuum:

- **Inadequate guidance.** Employees who seek guidance often find that their company has defined only the most basic standards—e.g., *Company email is intended for business use...*
- **Inadequate training.** Employees who seek training often find that their company offers courses only in the most basic functions of email software.
- **New media.** New communication tools—instant messaging, E-rooms, and the like—pose new challenges from a legal and records-management perspective. And again, these tools are usually delivered with no guidelines for their proper use, no writing standards, and no training.
- **Diluted messages.** Companies that attempt to convey clear guidance soon discover that they have *competing voices*—IT, legal, compliance, records management, training, etc. Correctly viewed, the challenge is a matter of not just policy formulation but of policy *coordination*; any solution will be *cross-functional*.

Writing behaviors & misconceptions



The challenge is two-fold:

- **preventing *bad* documents**—documents that lend themselves to hostile interpretation;
- **creating *good* documents**—enabling employees to create documents that are clear, complete, unambiguous.

Yet most companies face serious deficiencies in the way their employees create documents. These deficiencies fall into two categories:

- *ineffectiveness*—the writer fails to get the intended result;
- *inefficiency*—writers wasting time, both their own and their readers'.

Writing behaviors & misconceptions



The critical writing behaviors and misconceptions include the following:

- **No reflection.** Many employees shoot from the hip, saying in writing whatever comes to mind. Their targets and approach are unclear, and they use writing as a knee-jerk response with little consideration of whether it's appropriate to write at all.
- **Disorganized thoughts.** Many employees can think logically but are inexperienced with arranging their thoughts into a logical sequence or giving their ideas a clear train of thought. The result: writing that is difficult to read, or writing whose point is difficult to discern—or *both*.
- **Illusions about their readers.** Few employees realize that *just getting read* can be a major challenge. Busy, overworked professionals have little patience for writing that's hard to read or follow, and they'll make snap judgments about what to read and what to delete unread.

Writing behaviors & misconceptions



- **Credibility.** People often use our writing to gauge our credibility, taking a misplaced apostrophe or misused word and forming sweeping judgments about our competence. What's more, when employee writing goes outside the company, employee credibility becomes interchangeable with that of the company, i.e. the employee may be viewed *as the company*.
- **Inconsistent appearance.** These days employees have unprecedented control over the appearance of their documents, but few are using these tools with anything like sophistication. What's more, departments, project teams, and other groups seldom make the best use of styles, templates, and other features of programs like Microsoft Word.
- **Ineffective collaboration.** "Writing by committee" is still a common challenge and one that often results in documents that readers abhor. Today's employees need to be able to collaborate effectively and efficiently on all kinds of documents.

Recommended Targets for your own *Bad Documents*[®] initiative



TARGETED AWARENESSES

Employees will emerge with:

- shared values;
- sense of concern;
- writing tools;
- software sophistication.

TARGETED BEHAVIORS

Employees behavior will change in a number of important ways:

- reflections vs. shooting from the hip;
- questioning whether writing is appropriate;
- pre-writing tools;
- “the usual suspects”;
- appropriate action with colleagues;
- writing tools & practices.

The Salient Approach

Getting your program off the ground



Implementing a *Bad Documents*[®] program can be a complex undertaking. A few recommendations:

- **A cross-functional approach.** Salient projects to date have involved some measure of coordination among all the relevant functions—e.g., IT/IS, legal, compliance, records management, and training.
- **Structure of the program.** We recommend a two- or three-part structure. Example:
 - *Part 1: Good Documents* would focus on 1) risk awareness 2) decision-making tools, e.g., targeting results, limiting your distribution, when not to create a record.
 - *Part 2: Email Excellence* would show employees what it means to use the medium with intelligence and skill—and how to better serve their reader's needs.
- **Delivery options.** We recommend multimedia rather than seminars for three reasons: speed, consistency, and high impact.

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