

## Telling Your Story

by Larry Freeman, PhD  
The Shipley Group, *Senior Consultant*

“Telling Your Story” is a new writing strategy from the Shipley Group. We are introducing it because we find that the parallels between traditional storytelling strategies and today’s writing tasks are extensive. We believe that an individual working on a major document (or optionally, an organizational website) can learn useful lessons from the art of effective storytelling.

### What do I want you to do after reading this newsletter?

I hope you are able to try out some of the writing tips I discuss. And, of course, I hope you follow up with a call to the Shipley Group office for more information or for a consulting opportunity with your company or agency.

***“Telling Your Story” relies on two major themes:***

***Theme 1: Integrates traditional storytelling strategies into the creation of today’s complex documents and websites.***

***Theme 2: Assists business and technical specialists to efficiently create documents and websites that are as close to 100 percent clear as possible.***

Shipley Group intends to use these themes to help writers from business, industry, and governmental agencies to design clear documents and to do so efficiently. These two themes build on Shipley’s 33 years of experience conducting workshops for writers, editors, and even a few managers.

As early as 1980, Shipley consultants were helping business and technical writers design and then write effective documents. Clients have included engineers, accountants, geologists, financial planners, bankers, automotive designers, and environmental specialists.

**Traditional storytelling strategies (Theme 1)** are useful in today’s communication culture. Below I list six skills that today’s writers can apply to each document or website that they create. These six skills draw on concepts and tools used by traditional storytellers. I believe these skills are still very relevant.

One major advantage is the title itself: “Telling Your Story.” The title highlights storytelling skills, which remind writers that their number 1 task is to tell a good story. It should also remind them that complex business and technical information must be recorded so that lay readers can understand it and use it successfully.

**Clear and efficiently created documents or websites (Theme 2)** are as valuable today as they ever were. Today's writers need to design documents and websites to be as close to 100 percent clear as possible. An efficient writing process is also valuable because it saves both time and money. As I discuss the following six listed skills I will suggest ways for writers to save both time and money as they work on documents or websites.

ShIPLEY Group writing workshops, both in a traditional format or in parallel webinars, will address these six skills/objectives:

- 1. Tailoring your story to a reader's or viewer's potential questions**
- 2. Designing a website or document to allow users to easily find answers to their questions**
- 3. Telling readers or viewers what you expect them to get from the document or website**
- 4. Previewing your organization and its main content points**
- 5. Ensuring that both text and graphics are understandable and useful to users**
- 6. Reviewing a document or website for both content accuracy and correct language**

I first became aware of the storytelling analogy six years ago. Two senior governmental managers each approached the ShIPLEY Group about the need for their technically trained writers to become good storytellers. Their premise was that their resource specialists seemed unable to organize complex National Environmental Policy Act (NEPA) compliance content so that the information was accessible and understandable to lay readers.

We responded to these requests with a workshop "Telling the NEPA Story," tailored for the Federal Highway Administration and the Departments of Transportation.

I also wrote a newsletter entitled "Telling the NEPA Story." This newsletter is newsletter 54 (January 2007). This newsletter and others are available at <http://www.shipleygroup.com/news.html>. This ShIPLEY website contains an archive of ShIPLEY newsletters; some are specific to NEPA topics, but others are generic discussions of writing and editing topics.

### **1. Tailoring your story to a reader's or viewer's potential questions**

The assumption behind this skill/objective is that a writer should be communicating with readers/viewers from day 1 of work on a document or website. Traditional storytellers always had an audience, so storytellers were accustomed to "reading" their audience. A storyteller who failed to track reactions from an audience or to answer a question from an individual in the audience would not have lasted very long in the storytelling business!

In a similar way, a good writer today must anticipate the reactions and responses of readers/users. For writers, however, there is no raised hand or a raised spear to signal a question or a comment

from the audience. So writers, working alone, have to list likely questions from readers (or visitors to a website). Then the text has to address these questions, often by adding a topic or a clarification in the text.

**Shipley Recommendation:** Task 1 for writers is to list potential questions from projected readers/users. Note that this list of questions should come before writers begin to draft text. If writers have trouble listing possible questions, a good option is to answer standard questions about a projected topic: **what? where? why? when? and how?** Then writers should also brainstorm their own specific questions—**How much will the proposed changes cost? or What individuals or groups of individuals are likely to be affected and in what ways?**

This list of initial questions is essential because these same questions (repeated verbatim) should appear in both documents and websites. Just as good storytellers learned to do, a good way to engage an audience is to frame hypothetical questions for an audience to consider.

A writer can also frame hypothetical questions as a way of engaging readers who have not submitted actual questions.

Repeating questions in documents or websites is now becoming routine. Questions are useful as actual headings or subheadings in a document or website. This use of questions as headings leads directly to suggested skill 2—that is, a well-designed document or website. Good document design should use content-rich headings, including actual questions from potential readers/users. See writing skill 2 as discussed below.

**An efficient writing process** presumes that writers have generated a list of potential questions from readers/users. These initial questions should help writers define the scope of the proposed document or website. Without a well-defined early scope for a projected document or website, contributors often waste days or weeks writing unnecessary or irrelevant text. Poor early planning costs time and money.

## 2. Designing a website or document so that readers/users can easily find answers to their questions

Storytellers were and still are very proactive. They know that their success depends on their rapport with an audience. Think of the old saying: “That storyteller had the audience eating out of her hand!” This saying tells me that this storyteller is recounting content that leads the audience to engage with the storyteller and what the storyteller is saying.

Yes, the oral and dramatic tools used by a storyteller are different from a writer’s verbal tools. But these differences do lead to a key Shipley recommendation.

**Shipley Recommendation:** Design a document or website so that all readers/users are forced to see and to engage with your major content points, especially key conclusions and recommendations.

Writers should recognize that they need to control what readers/viewers see and eventually understand.

**A collaborative storyboard** is the most efficient way for multiple contributors to collaborate on a well-designed document or website. A storyboard is much more visual than a traditional outline. A storyboard sketches all potential graphics and plans for the visual design of each page (with marginal callouts, headlines, and other format features). An outline merely lists content topics.

Storyboards allow multiple contributors to flesh out their vision of a projected document or website. Contributors include multiple writers, technical specialists, and, if possible, key managers. See [ShIPLEY Group newsletters](#) 56 and 61 for more information about storyboards and several sample storyboard pages.

**Deliberate emphasis is the key to clear and powerful documents.** A good writer must take command of the core message in a document or website. Readers can sense when writers control the message. Conversely, readers know when a document or a website is rambling, confused, or inconsistent. Readers of a confused document or website distrust the content and the writers. Eventually, readers see such writers and their organization as unprofessional, even deceptive.

Review a key page or two of a recent document of yours (optionally, several screens of a website). Are major content points highlighted in headings and subheadings? Are lists of reasons displayed in numbered or bulleted lists (as opposed to dense traditional paragraphs)? Does the page layout (columns, headers/footers, and graphics) show readers that the writer or writers have their content under control?

**A writer's goal for a document or website is to be 100 percent clear.** All readers should get the same clear message. Even a distracted or sleepy reader should not miss the main message. The clarity of the message is why writing skill 2 (as stated above) speaks about a reader or user being able "to easily find answers to their questions." A usable document or website is one that helps readers or users navigate to find relevant and useful information.

Skillful writers are often manipulating their readers/viewers just as aggressively as most traditional storytellers manipulated individuals in their audiences.

### **3. Telling readers or viewers what you expect them to get from the document or website**

I am suggesting this third skill/objective because writers sometimes believe that their purpose is going to be obvious to readers/viewers. Writers should never assume that something is truly obvious to 100 percent of possible readers. The reality is that no writer is ever 100 percent clear!

Storytellers, with an audience in full view, rarely had to remind themselves to clarify their purpose. Members of an audience could speak up if a content point wasn't clear. In extreme cases, a member of the audience might interrupt the storyteller with a shouted comment or question.

Writers have never gotten such active feedback.

**ShIPLEY Recommendation:** Always tell your readers/viewers what you expect them **(1) to do, (2) to know, or (3) to feel.**

These three purposes are the classic ones in any document or website where the reader/viewer is expected to respond with actions. Sometimes, a writer has only a single purpose for writing; for example, an email might ask for a manager to approve a funding decision (a to-do request). In other instances, a writer's document may touch all three purposes; the funding action might require the manager to know factual information, plus a degree of trust for the writer of the email.

***Remember to take time to tell your readers/viewers what you expect them to be able to do, to know, or to feel after they have read your document or surveyed your website.***

An efficient document has a stated purpose, and this purpose or purposes should be emphasized by inclusion in a major heading or, optionally, in a shaded callout box. Your goal as you design your document/website (listed skill 2 above) is to emphasize the purpose or purposes.

#### **4. Previewing your organization and its main content points**

Suggested skill 4 is likely redundant with listed skills 1, 2, and 3. For example, if you listed questions from potential readers (skill/objective 1), you already have in mind both a purpose for the document or website and a possible organization.

**ShIPLEY Recommendation:** Tell your readers/viewers how you are organizing your content. Are you going to review recent events before discussing earlier problems? Or, do you open with the prior problems before arriving at your suggested remedies? Do you plan to survey external examples before turning to internal challenges?

In most cases, you should provide a useful table of contents for readers to use as they navigate from question to question or from topic to topic. For example, page 1 of a document might tell readers that cost estimates for a proposed project appear in discussion point 4. Such a forecast allows readers to begin to predict the shape and extent of later information.

Predictable content is always clearer to read the first time through a document. And even more important, most readers or listeners will be able to remember predictable information.

Storytellers often use similar previews of content. For example, many skillful speakers today take time to tell listeners what topics will be covered and in what order.

This preview list of content points can appear early in text or on the opening screen of a website. Whichever way you present the content preview, use format tools to emphasize them. In text or a

website, the preview list could appear as a list of bullet points. Optionally, a list of content points might be recorded in a shaded callout box.

Whichever way you decide to record the preview of topics, consider using a numbering system. The numbering system used in scientific publications is the quasi-decimal one: Chapter 2, subsections 2.1. 2.2, 2.3 and then, 2.3.1, 2.3.2 etc; Shipley consultants recommend this form of numbering, especially for complex documents.

Note that in designing a website, numbered chapters or sections are often unnecessary. The home page for a website likely has a menu of linked topics, which viewers can access by clicking on the desired topic.

### **5. Ensuring that both text and graphics are understandable and useful to users**

Storytellers are able to assess their content and their delivery skills continuously. Such feedback is invaluable. A storyteller can immediately decide to add a comment or a story or, perhaps, to delete a comment or story. Writers clearly don't have instant feedback. A published writer may even need to wait until a second edition (if it even occurs) to correct errors or to revise an unclear chapter.

**Usability testing** is an efficient way for writers to get feedback before sending out a crucial report or publishing a complex technical study. Usability testing is a procedure for validating that content is "understandable and useful to users." Here is a simple version of usability testing:

1. Go back to the list of questions from skill/objective 1.
2. Give the questions to several colleagues (folks not familiar with your document or website).
3. Ask the colleagues to find answers in the document or website. They should flag where they find answers and, perhaps, even record how long it takes them to find the answers.
4. Ask the colleagues for feedback. Were the answers 100 percent clear? Did all colleagues find the same answers in the same sections? Were answers easy to find?
5. Depending on their answers, a writer or writers can develop an action plan for improving the clarity of a document or website.

**Shipley Recommendation:** Conduct usability testing when you have crucial documents or websites that you want to assess. Such testing can be brief and efficient because you are not asking someone to rewrite the text or to proofread the entire text. Instead, efficient usability testing focuses on the overall clarity of the document or website. It gives writers useful feedback on their skills as writers.

Don't confuse usability testing with routine internal editing and proofreading. Often, a single manager conducts such internal reviews. See the discussion of organizational reviews below under skill/objective 6

### **6. Reviewing a document or website for both content accuracy and correct language**

Careful organizational reviews are the essential last step in ensuring a high-quality document or website. This step is missing from the storytelling world. Yes, listeners or the audience likely would give a storyteller some feedback on a storytelling session, but such feedback likely would rely on informal comments and suggestions.

In today's complex technical world, document reviews have serious organizational and even legal implication. So reviews of documents (or websites) should not rely on informal comments and incidental suggestions.

**ShIPLEY Recommendation:** Establish a clear written procedure for reviews of major documents or websites. This written procedure should identify who are assigned reviewers, how they should record their comments and corrections, and who is responsible for final corrections before a document is finished. Be sure to include time for reviews in formal project schedules and accept the need to fund adequate reviews. Without assigned staff time and funding, reviews are likely to be too sketchy and too late to be useful.

The reality in many companies and agencies is that the review process is ad hoc chaos. Reviewers are assigned depending on who is in the office that day. No clear review standards exist. And reviewers/managers are often asked merely to "take a look at a document" before it is emailed or published. Who has the authority for a go or no-go decision on a crucial document? Who, if anybody, is managing the organization's documentation process?

Here are a few suggestions for fulfilling the ShIPLEY recommendation, as stated above.

- 1. Reviewers have clear review priorities (and time) when asked to review a document.**
- 2. Both the reviewers and the writers should be working from the same list of written quality standards.**
- 3. Reviewers should distinguish between obvious errors in content or grammar and a reviewer's personal preferences about phrasing or the choice of words. Writers need to know which suggestions from reviewers are mandatory changes.**
- 4. Usually the writers or writers should be responsible for necessary revisions, but there should a procedure for checking to see that revisions are satisfactory.**

[ShIPLEY newsletters](#) 92 (Oct 2012) and 96 (April 2013) discuss quality standards. These newsletters also include ShIPLEY's generic checklist of suggested quality standards.

Link to ShIPLEY Group Newsletter Articles: <http://shipleysgroup.com/news.html>